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FROM BROWSING TO BUYING AND BEYOND: THE NEEDS-ADAPTIVE SHOPPER JOURNEY MODEL

--Manuscript Draft--

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Full Title:	FROM BROWSING TO BUYING AND BEYOND: THE NEEDS-ADAPTIVE SHOPPER JOURNEY MODEL
Corresponding Author:	Leonard Lee, Ph.D. NUS Business School Singapore, Singapore SINGAPORE
Order of Authors Secondary Information:	
Other Authors:	J. Jeffrey Inman
	Jennifer J. Argo
	Tim Boettger
	Utpal Dholakia
	Timothy Gilbride
	Koert van Ittersum
	Barbara E. Kahn
	Ajay Kalra
	Donald R. Lehmann
	Leigh M. McAlister
	Venkatesh Shankar
	Claire I. Tsai
Abstract:	We propose a theory-based model of the shopper journey, incorporating the rich literature in consumer and marketing research and taking into account the evolving retailing landscape characterized by significant knowledge, lifestyle, technological, and structural changes. With consumer well-being at its core and shopper needs and motivations as the focus, our needs-adaptive shopper journey model complements and contrasts with existing models. Additionally, we identify 12 shopper journey archetypes representing the paths that consumers commonly follow - archetypes that illustrate the workings and applications of our model. We discuss the nature of these archetypes, their relationships with one another, and the psychological states that consumers may experience on these shopper journeys. We also present exploratory empirical studies assessing the component states in the archetypes and mapping the archetypes onto dimensions of shopping motivations. Finally, we lay out a research agenda to help increase understanding of shopper behavior in the evolving retailing landscape.
Author Comments:	Dear Joel: Thank you very much for accepting our manuscript (JACR Ms. No. 2017070R3) for the special issue on Consumer Response to the Evolving Retailing Landscape in the Journal of the Association for Consumer Research (JACR). We are honored to have the opportunity to publish our work in JACR! Please find enclosed the final manuscript and the associated documents (i.e., figures, web appendices), reformatted according to the JACR "Guidelines for Accepted Manuscripts." As per your suggestions, we have revised Figure 2 as well as the description of our perceptual map in the manuscript. In addition to this change, we have swapped the previous Table 2 in the manuscript with Table B.2; given that JACR does not include appendices (which we now include as web appendices) in the printed article according to the "Guidelines for Accepted Manuscripts," we felt that this table substitution would better align the main text with the printed table, since much of the

	discussion on the shopper journey archetypes in the main article is based on the data in the previous Table B.2 and not those in Table 2. Nonetheless, we clearly highlight the correspondence between these two tables in the main manuscript as well as the web appendix. We hope you agree with our judgment. Finally, thank you again for your careful guidance and for giving us the opportunity to publish in JACR. Yours sincerely, Leonard Lee, Jeff Inman, Jennifer Argo, Tim Boettger, Utpal Dholakia, Timothy Gilbride, Koert van Ittersum, Barbara Kahn, Ajay Kalra, Don Lehmann, Leigh McAlister, Venkatesh Shankar, and Claire Tsai
Additional Information:	
Question	**Response**
Please provide the word count for your manuscript (from title to end of references, excluding tables, figures, and appendices; should be *~8,000 wds max*).	9877
Required for final submission of **Conditionally Accepted Manuscripts**: Please provide a short synopsis of your study, presented in layman's terms, that can serve as a foundation for a press release and can be used to promote the article in other ways. For detailed instructions on what we are looking for, go to Guidelines for Accepted Manuscripts.	Significant knowledge, lifestyle, technological, and structural changes in the consumption environment over the past two decades have drastically altered the shopping patterns and behaviors of consumers, presenting new opportunities and challenges for marketers to persuade consumers to buy, and not just browse. In view of these changes and the growing wealth of knowledge in marketing research and retailing practices, we develop a conceptual framework of the shopper journey that complements and contrasts with other existing models: the needs-adaptive shopper journey model. With shopper well-being at its core, this model facilitates a deeper understanding of the broad range of shopper needs and activities that occur in a shopper's journey, so that firms can better adapt to the differing needs of shoppers and maximize satisfaction. Additionally, we identify and discuss 12 shopper journey archetypes representing the paths that consumers commonly follow depending on their shopping needs.
Keywords:	Shopper behavior Shopper journey Needs and motivations Retailing

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FROM BROWSING TO BUYING AND BEYOND:

THE NEEDS-ADAPTIVE SHOPPER JOURNEY MODEL

Leonard Lee, National University of Singapore
J. Jeffrey Inman, University of Pittsburgh
Jennifer J. Argo, University of Alberta
Tim Böttger, University of St Gallen
Utpal Dholakia, Rice University
Timothy Gilbride, University of Notre Dame
Koert van Ittersum, University of Groningen
Barbara Kahn, University of Pennsylvania
Ajay Kalra, Rice University
Donald R. Lehmann, Columbia University
Leigh M. McAlister, The University of Texas at Austin
Venkatesh Shankar, Texas A&M University
Claire I. Tsai, University of Toronto

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Corresponding author: Leonard Lee, NUS Business School, National University of Singapore (email: leonard.lee@nus.edu.sg).

ABSTRACT

We propose a theory-based model of the shopper journey, incorporating the rich literature in consumer and marketing research and taking into account the evolving retailing landscape characterized by significant knowledge, lifestyle, technological, and structural changes. With consumer well-being at its core and shopper needs and motivations as the focus, our needs-adaptive shopper journey model complements and contrasts with existing models. Additionally, we identify 12 shopper journey archetypes representing the paths that consumers commonly follow – archetypes that illustrate the workings and applications of our model. We discuss the nature of these archetypes, their relationships with one another, and the psychological states that consumers may experience on these shopper journeys. We also present exploratory empirical studies assessing the component states in the archetypes and mapping the archetypes onto dimensions of shopping motivations. Finally, we lay out a research agenda to help increase understanding of shopper behavior in the evolving retailing landscape.

MOTIVATION AND OBJECTIVES

When do consumers decide to buy after browsing in a store or receiving information about a product or brand? Why and how do they shop in the first place? The importance of these questions for retailing and marketing is underscored by the proliferation of myriad choice models and decision frameworks that characterize how consumers shop (Lilien, Kotler, and Moorthy 1992). These models include general models such as the traditional purchase funnel model, and commercial frameworks such as McKinsey's Consumer Decision Journey (Court et al. 2009). Following the development of many of these widely adopted models, significant changes in the marketplace and the broader consumption environment have emerged over the past two decades. These changes have drastically altered the shopping patterns and behaviors of consumers, presenting new opportunities and challenges for marketers to persuade consumers to buy, and not just browse.

With significant macro-changes as the backdrop, and drawing upon the wealth of knowledge in academic research in marketing and consumer psychology as well as retailing practices and trends, we develop a conceptual framework of the shopper journey that complements existing models that are more managerially oriented. This framework provides a foundation for a deeper understanding of the broad spectrum of activities that occur in a shopper's journey and the shopper's state of mind during this journey. We hope that this understanding will in turn facilitate further study on the impact of shopper journeys on consumer well-being. Further, based on our proposed framework, we identify and discuss twelve *shopper journey archetypes* that characterize the common paths that consumers traverse when shopping, depending on their needs and motivations. These archetypes include the *classic* journey, as well

as more idiosyncratic journeys such as the *impulsive* journey, the *entertainment* journey, and the *learning* journey.

In the remainder of this article, we first briefly review existing customer journey models, discussing their strengths and weaknesses, followed by the key changes that may necessitate a fundamental rethinking of how and why consumers shop and the implications of these factors on the existing models. Next, we describe in detail our proposed revised conceptual framework—the *Needs-Adaptive Shopper Journey Model*, followed by common shopper journey archetypes that characterize the typical paths taken by shoppers. We also present exploratory empirical studies assessing the stages of the archetypes and mapping the archetypes onto various dimensions characterizing shopping motivations (e.g., buying vs. browsing, goal-oriented vs. non-goal oriented). Finally, drawing upon our proposed framework and the shopper journey archetypes, we identify a number of key questions and directions for future research. We hope that these efforts together will push the frontiers of research in retail marketing and shopping behavior.

EXISTING MODELS AND THEIR POTENTIAL LIMITATIONS

The study of customer journeys and the path to purchase has a long tradition in marketing and retailing. It occupies a substantial part of the literature. Over the years, numerous models have been proposed to depict a consumer's shopping journey, ranging from the basic purchase funnel model to the more elaborate Consumer Decision Journey (CDJ) and Customer Journey Mapping (CJM) models. Of late, there has been a resurgence in this important area of research inquiry. Emerging work focuses mainly on the concept of customer experience (e.g., Lemon and Verhoef 2016), and departs from the early emphasis on the marketing strategy perspective of

customer journeys in the 1980s (see Web Appendix A for a review of the evolution of this literature over the last thirty-seven years, and an in-depth discussion of the most commonly applied models). While shopper models have increasingly taken the consumer's perspective and the role of technology in shopping behavior into consideration, they tend to revolve around the purchase stage of a stylized shopping process and are relatively intractable. Arguably, not all shopping episodes end with a purchase, and many shopping episodes are not even motivated by a purchase goal (Bloch, Ridgway, and Sherrell 1989). Relatedly, and critically, none of the models accommodate the wide-varying needs or goals of shoppers across journeys.

In this paper, we propose an integrative model that addresses these limitations and takes into account the vast body of conceptual and empirical work that marketing researchers have amassed in the last two decades, as well as significant changes in the marketplace and the broader consumption environment that have occurred. We discuss four categories of changes to the retailing landscape in the next section.

THE EVOLVING SHOPPING LANDSCAPE

Over the past twenty years or so, a number of macro shifts have disrupted the retailing industry and changed the way that companies need to think about shoppers. These changes have drastically altered shopping patterns and buying decisions, and present new opportunities and challenges for marketers to persuade consumers to spend money and encourage repeat purchase. Here, we briefly discuss four main categories of emergent changes:

- *Knowledge changes*: Consumers are more knowledgeable about offerings in the marketplace today, and have convenient and uninterrupted access to a diverse range of information sources about brands and products. This gives them the ability to make more informed

decisions. In many cases, consumers may be more well informed about new products and pricing than the retailers' own sales personnel (e.g., Pitt et al. 2002).

- *Lifestyle changes*: Not only do new forms of entertainment now compete with shopping as a recreational activity and for spending dollars, consumers' lives have also become significantly more hectic (Gershuny 2011). Rapid globalization has accelerated information transmission, internationalized consumers' tastes and preferences, and accentuated the power of social influence in shopping behavior.
- *Technological changes*: Technological advancements (e.g., the Internet, mobile technologies, social media, shopper-facing technologies) have provided new ways and channels for consumers to shop (e.g., showrooming, webrooming), and for researchers to capture valuable data about how consumers shop (Shankar et al. 2011; Van Ittersum et al. 2013; Inman and Nikolova 2017; Sheehan and Van Ittersum 2018).
- *Structural changes*: Product assortments and brand availability have also seen tremendous expansion (Broniarczyk 2008). Furthermore, the recent surge in omnichannel retailing has fundamentally changed how retailers develop and execute their marketing strategies and how consumers shop, making it necessary for consumers to consider the choice of product, brands, and channels simultaneously (Neslin and Shankar 2009; Neslin et al. 2014; Verhoef, Kannan, and Inman 2015).

Driven by these diverse changes and acknowledging the potential limitations of existing models in accounting for them, we develop a revised framework to complement existing models and serve as a guide in thinking about why and how consumers shop today, when they choose to buy, and whether they repurchase. We do this by drawing upon the rich body of conceptual and empirical findings across domains, including marketing strategy, consumer psychology,

judgment and decision making, social influence, information systems, and customer experience, along with the latest developments in the retailing industry. We also propose a number of research directions to improve our understanding of this framework and its ramifications.

THE NEEDS-ADAPTIVE SHOPPER JOURNEY MODEL

Guiding Principles in Developing a Revised Framework

To develop our revised framework that depicts why and how consumers shop while incorporating the marketplace changes that we discussed in the previous section, we established a set of general guiding principles. First, as suggested by Google's concept of "micro-moments," we recognize that shopping today does not always adhere to a linear process (e.g., Lemon and Verhoef 2016) as assumed by the traditional purchase funnel model. Instead, shoppers switch back and forth between states, and these inter-state transitions depend on a host of factors, particularly the primary motivation(s) of the shopper in undertaking the journey. Therefore, we conceptualize a shopper's journey as a configuration of states, rather than a sequence of steps or stages. Such an approach incorporates a high degree of flexibility and configurability, and generalizes to various types of shopping.

Second, instead of focusing on retailer interests and business profits, we believe it is just as important, if not more so, to shine the light on shopper goals and well-being (see Christensen et al. 2016 for a discussion on taking a "jobs to be done" perspective in innovation and strategy). This emphasis on shopper well-being constitutes the core of our framework development. While prior models have largely assumed a one-size-fits-all shopping process across consumers, in our work, we consider shoppers' goals and motivations explicitly in shaping their shopping journeys.

We use our framework to generate a number of *shopper journey archetypes* comprised of particular states that shoppers traverse and how they transition between these states.

Third, beyond the primary motivation, we also note that ancillary contextual factors, such as social influence and the retailer's actions and strategies, could affect the journey through the cognitive and behavioral states consumers experience while shopping.

The Proposed Framework

Figure 1 illustrates our proposed framework based on: (1) the guiding principles described above; (2) the emergent changes in the marketplace; and (3) the respective strengths and weaknesses of the prevailing models. In essence, the framework is a needs-adaptive model with *shopper well-being* at the core. Placing shopper well-being at the core of our needs-based model underscores our emphasis on the importance of viewing shopping through a consumer-centric lens and the importance of focusing on shoppers' needs.

--- Insert Figure 1 about here ---

The middle ring of the model consists of the various cognitive and behavioral *states* that a shopper can experience during the shopping journey. Although space constraints prohibit a detailed exposition of each one, we briefly discuss them here to highlight their theoretical basis and roles in a consumer's shopping journey (see Table 1 for a brief description of each state).

The core states of *recognize need/want*, *aware*, *search*, *evaluate*, *decide*, *purchase*, *use*, and *post-use evaluate* can be traced to the Howard-Sheth buyer behavior model (Howard and Sheth 1969; Farley and Ring 1970). Consumers progress sequentially through these states when making major buying decisions. Our proposed framework includes a number of additional states that are significant in today's diverse shopper journeys.

The *explore* and *browse* states capture the significant role played by consumerism in everyday activities (Miles 1998) and the fact that much of knowledge acquisition and interaction with products and services occurs without clear purchase intent (Bloch, Ridgway, and Sherrell 1989). *Intrigue* reflects a heightened level of curiosity about a facet of the consumer's shopping experience and may be a function of the consumer's chronic tendency or a particular contextual factor such as a novel product or atypical display (Steenkamp and Baumgartner 1992).

The *wait* state indicates that consumers may choose to withdraw into a state of inactivity prior to moving to a more active stage such as *purchase* or *use*, or be forced to do so because the retailer's delivery processes entail delay (Berry, Seiders, and Grewal 2002). Increasingly important are the *advocate/critique* and *share* states involving active contributions by consumers in social venues to engage others in their shopping journeys (Chen and Xie 2008). For instance, consumers may describe a particularly enjoyable dining experience on a Facebook group, post a scathing product review on a retailer's site, or attend a sample sale with close friends. Finally, we also include the *validate* state wherein consumers seek confirmation from other sources for their choices, actions, or stated opinions, and the *withdraw* state marking the end of consumers' interactions with the product or brand (Fournier 1998).

A shopper may traverse one or a combination of these states recursively and in any order to fulfill particular shopping goals, or during the course of day-to-day activities. Together, these states enrich, complicate, but realistically capture the various facets of consumers' shopping experiences.

--- Insert Table 1 about here ---

Returning to Figure 1, the model is flanked in the outermost ring by *four groups of factors* that influence a consumer's shopping process: the shopper's psychology, firm and retailer actions, social influence, and technology. We elaborate on each of these below.

Shopper's psychology: The consumer may experience different cognitive and behavioral states during the shopping process. These states are often driven by either the shopper's specific goals prior to shopping (Lee and Ariely 2006; Sheehan and Van Ittersum 2018), or motivations triggered in real time by situational factors (such as sensory arousal; Turley and Milliman 2000) within the shopping environment. Furthermore, these goals and motivations can be moderated by shoppers' chronic dispositions and other psychological factors. For example, consumers who enter a store with a concrete shopping goal (e.g., "to buy a tuna sandwich" vs. "to buy something for lunch") are less influenced by in-store promotions and less likely to browse and buy impulsively (Lee and Ariely 2006). As another example, shoppers' psychological needs (e.g., need for touch; Peck and Shu 2009; need for control; Chen, Lee, and Yap 2017) can affect the amount of time that consumers spend in different shopping channels (e.g., brick-and-mortar vs. online) and their interest in purchasing different types of products (e.g., utilitarian vs. hedonic).

Firm/Retailer actions: Firms and retailers may take specific marketing actions or implement particular strategies—be it with regard to marketing mix elements (price, product, place, or promotion) such as availability of different shopping channels (Neslin and Shankar 2009), consumer touchpoints (Lemon and Verhoef 2016), or aspects of the in-store environment—that impact how shoppers think, feel, and behave during the shopping process (Turley and Milliman 2000). A recent study by Inmar, Inc. (2017), for example, shows that among the 69% of shoppers who made shopping lists before visiting a physical store, 41% used coupons to do so. This may affect their in-store shopping behavior. Likewise, conducting taste

tests in a grocery store has been found to increase purchases of private-labels over national brands (Bronnenberg, Dubé, and Sanders 2017).

Peer-to-peer/Social: Whether it is one's shopping companion(s), the sales staff, or the mere presence of other shoppers, social factors can produce a major influence on a consumer's shopping process and eventual purchases (Argo, Dahl, and Manchanda 2005; Kurt, Inman, and Argo 2011). The accelerating growth of social media has further accentuated the strength of social influence on how consumers shop and what they purchase. For example, Kurt et al. (2011) show that men (but not women) spend more when they shop with a friend and explain this effect using agency-communion theory (Bakan 1966).

Technology: Technology has injected substantial changes into how consumers shop, not only through availability of multiple channels (e.g., brick-and-mortar, online, mobile), but also by transforming shoppers' in-store experience. Kiosks and self-service checkout systems within a physical store, Internet of Things (IoT) technologies such as sensors, beacons, and mobile devices to allow location-sensitive in-store marketing communications, artificial intelligence and machine learning for market research to enhance personalization in shopping (Argyros 2017; Baird 2017), and avatars, virtual or augmented reality in online and mobile stores to deliver an immersive virtual shopping experience (Holzwarth, Janiszewski, and Neumann 2006; Van Ittersum et al. 2013; Inman and Nikolova 2017) are all examples of technology's influences on the shopping process. (Shankar et al. 2011 provides a review of technology-driven innovations in shopper marketing.)

SHOPPER JOURNEY ARCHETYPES

Twelve Common Shopper Journey Archetypes

To illustrate the applications of our needs-adaptive shopper journey model, in this section we present 12 shopper journey archetypes that we believe capture the most typical shopping occasions commonly experienced by consumers. We briefly discuss each archetype below, and then delve deeper into the potential relationships among them. We also discuss how these shopper journeys relate to our proposed revised shopper journey model.

Additionally, to examine the relative frequency and psychological correlates of these shopper journey archetypes, we conducted an exploratory critical incident study (Flanagan 1954) in which we asked a panel of 502 online respondents to recall, describe, and self-categorize a recent shopping episode. Participants were first asked to choose one specific archetype that best represented their recalled shopping episode, and could then choose as many of the archetypes as they deemed fit to represent the shopping episode (see Web Appendices B and C for the detailed methodology, survey questions, and study results). In addition, we also asked the participants to map their shopping episode as well as a subset of the shopper journey archetypes (randomly determined) to the various cognitive and behavioral states described in our shopper journey model. Furthermore, participants completed the *Hedonic Shopping Motivations* scale (Arnold and Reynolds 2003) which included 18 items that assess the extent to which consumers are chronically driven by six hedonic shopping motivations: adventure shopping, gratification shopping, role shopping, value shopping, social shopping, and idea shopping. Although these six shopping motivations do not capture the entire set of consumers' shopping goals, including the scale in our study provides a preliminary understanding of how these six motivations are associated with the twelve shopper journey archetypes. Where appropriate, we highlight relevant findings from this pilot study in the discussion that follows. The archetypes are presented in order of how frequently they were mentioned in the critical incident survey.

Classic journey: This shopper journey describes a linear shopping process, characterised by an initial awareness or identification of a need (or needs), the consideration of different brands or product options, and the eventual choice and purchase of one particular brand or product. This journey closely matches the sequential process in the traditional purchase funnel model, and is often regarded as the presumed standard way in which consumers shop.

Required journey: This shopper journey is typically regarded as essential for the purchase of necessary, utilitarian items. It could also arise because of a role that the shopper plays in life (Tauber 1974). Examples include buying office supplies for one's workplace, renting equipment or buying party items for a wedding celebration. As highlighted by these examples, such a journey can be undertaken on either a periodic basis or an ad-hoc basis.

Opportunistic journey: This shopper journey is motivated by certain opportunities (for consumers) arising from the external environment, such as a sales promotion (Bucklin and Lattin 1991) or the launch of limited-edition products. It is characterized by a state of awareness leading consumers to feel intrigued or excited (see Table 2). The *opportunistic* journey may not be preceded by any concrete buying goals. It may be driven by the desire to acquire transaction utility through enjoying price discounts or being the first (or among a few) to own a product (Lichtenstein, Netemeyer, and Burton 1990). For instance, the ability to save money through price discounts could drive unplanned stockpiling (Mela, Jedidi, and Bowman 1998). In our study, value shopping [$p < .01$] and adventure shopping [$p < .05$] motivations were associated with the *opportunistic* shopper journey.

--- Insert Table 2 about here ---

Entertainment journey: The *entertainment* journey is undertaken primarily for hedonic, recreational purposes. It may not necessarily be driven by the onset of negative feelings and the

desire to repair these feelings, as in the case of the *retail therapy* journey which is motivated by the desire to repair negative emotions (as discussed in greater detail later). Moreover, consumers may or may not have concrete goals before embarking on this shopper journey, and they may not make any purchases by the end of it (as in the case of mere browsing or window shopping; Bloch, Ridgway, and Sherrell 1989). Rather, consumers undertake this journey simply because they find shopping intrinsically enjoyable and hedonically gratifying (Arnold and Reynolds 2003). This journey was associated with three shopping motivations in our study: adventure shopping [$p < .01$], social shopping [$p < .01$], and gratification shopping [$p < .10$].

Routinized habit journey: This shopper journey is essentially a habitual routine that consumers undertake periodically (Hoyer 1984; Pahnila and Warsta 2010). A canonical example is the weekly grocery shopping trip of many consumers, often accompanied by a detailed shopping list. This shopper journey archetype contrasts starkly with the *opportunistic* shopper journey [$\Phi = -.137$, $p < .05$] (see Table B.3 in the Web Appendix). It is characterised by consumers' awareness and recognition of a need, which then triggers purchase and product usage. Given the routinized nature of this journey, compared to other shopper journeys, consumers engaging in it are considerably less "intrigued," and also less likely to explore, browse, or evaluate other options before purchase, and subsequent to purchase, less likely to advocate/critique or share their consumption experience of the purchased product (see Table 2).

Joint journey: The *joint* shopper journey is undertaken in close consultation with one or more fellow shoppers (e.g., a significant other), such that the eventual buying decision is made by a group rather than a sole shopper (Davis 1976; Mangleburg, Doney, and Bristol 2004). We distinguish this shopper journey from the *outsourced* journey and the *social network* journey to highlight the high involvement, collaborative shopping and decision making involved in this

shopper journey, such as when buying a big-ticket item (e.g., an expensive car) or an item for joint consumption (e.g., a vacation package). Like the *outsourced* journey archetype, the *joint* journey was associated with motivations of social shopping [$p < .01$] and role shopping [$p < .10$] in our study. Compared to other archetypes, however, the *joint* journey is characterized by consumers' tendency to engage in shared consumption, advocate/critique their consumption experience of the purchased product, and validate their purchase with the joint decision-maker(s) (see Table 2).

Impulsive journey: This shopper journey is typically initiated without any particular shopping goals or purchase intent, but often results in impulse or unplanned purchases. Much research has attempted to uncover the antecedents of impulse buying and unplanned purchases, so as to better understand the moments within the shopping process and contextual circumstances under which shoppers are most vulnerable to marketing influence (Bell, Corsten, and Knox 2001; Inman, Winer, and Ferraro, 2009; Hui et al. 2013). In our study, not surprisingly, this archetype was associated with motivations of gratification shopping [$p < .01$]. Similar to the *entertainment* journey, the *impulsive* journey is characterized by a higher degree of intrigue and exploration during shopping; however, it is also more likely to result in an eventual purchase, and less likely to involve consumers' sharing their shopping/consumption experience with others (see Table 2).

Learning journey: The *learning* journey is driven by the desire to learn about trends and changes in the marketplace such as what brands, products, and stores are newly available, and which ones are popular. The acquisition of such knowledge is itself an end goal in this shopper journey, and consumers typically do not have any specific purchase goals in mind. However, unlike the *required* journey or the *routinized habit* journey, consumers may have a more

exploratory mindset in a *learning* journey and thus be more susceptible to impulse purchase (Bloch, Sherrell, and Ridgway 1986; Baumgartner and Steenkamp 1996). In our survey, the *learning* journey was characterized by motivations of adventure shopping [$p < .01$] and social shopping [$p < .05$]. In this journey, consumers are intrigued by the available products or brands and are also more likely to evaluate them so as to form an opinion about them, when compared to other types of shopper journeys. Consequently, consumers may advocate or critique products in front of others (see Table 2).

Gifting journey: This shopper journey is motivated by the need or desire to buy a gift for others (Belk 1976). Although one might deem this journey as a special case of the *classic* journey, the socially driven goal of gifting brings with it a different set of cognitive and affective states than when making a purchase for oneself, such as buying food for lunch. Moreover, some research has suggested that consumers often feel happier spending money on others than on themselves (Dunn, Aknin, and Norton 2008), suggesting that this shopper journey may also carry retail therapy benefits. This journey archetype was associated with motivations of role shopping [$p < .01$] in our survey.

Retail therapy journey: This shopper journey is motivated by the desire to feel better after experiencing negative emotions (Lee 2015). The negative feelings could arise from certain perceived psychosocial deficiencies experienced by consumers. In this light, retail therapy is a form of compensatory consumption response (Mandel et al. 2017). Lay intuition and commercial studies alike have implicated the prevalence of this shopper journey (Cooper 2013), while experimental findings suggested that shopping can be effective in inducing positive affect and "mending the broken soul," regardless of whether any purchase is made (Atalay and Meloy 2011; Lee and Böttger 2017). Interestingly, motivations of gratification shopping [$p < .01$], idea

shopping [$p < .05$], and role shopping [$p < .10$] were positively associated with this shopper journey, while value shopping [$p < .10$] was negatively associated with it.

Social network journey: This shopper journey typically arises from interactions or transactions of consumers with others within their own or other existing social networks. The accelerating adoption of social media accompanied by a growing reliance on user-generated (vs. market-generated) content has not only reduced interpersonal distance but also spurred the growth of this shopper journey, as consumers acquire value such as entertainment, information, and interaction through social media (Chung and Kristine 2010; Goh, Heng, and Lin 2013). A widely popular form of social-network shopping is peer-to-peer shopping where consumers shop through platforms such as Craigslist, Nextdoor, and eBay and engage in buying and selling with strangers. This shopper journey archetype was characterized by motivations of gratification shopping [$p < .01$] and social shopping [$p < .01$], and like the *retail therapy* archetype, was negatively associated with value shopping [$p < .10$].

Outsourced journey: The *outsourced* journey typically involves delegation of a portion (e.g., product recommendation) or the entire shopping process to someone else, such as a close friend or family member, a domestic helper, a personal shopper, or even a voice-activated virtual assistant (Aggarwal and Mazumdar 2008; Forer 2017). In many such cases, shopping is regarded as a necessary chore, a laborious activity that one is happy to pass on to someone else. In some cases, however, one may do this purely out of convenience, time constraints, or a desire to seek and rely on an expert's opinion regarding what to buy. With the shrinkage of leisure time for many shoppers (Gershuny 2011), and coupled with the availability of other new forms of recreation, we would expect this journey to become increasingly prevalent. This shopper journey archetype was characterized by motivations of role shopping [$p < .05$] and social shopping [$p <$

.05]. In the *outsourced* journey, what is most salient in consumers' minds is not the actual shopping process itself, but rather the product's usage and its post-use evaluation/critique (see Table 2).

Dimensions of Shopper Journey Archetypes

To organize the shopper journey archetypes and to better understand the relationships among them, we conducted a second exploratory study in which we randomly assigned three of the archetypes to each of 174 lab participants recruited from a large university. We asked participants to rate each assigned shopper archetype along 11 different bipolar dimensions based on the archetype's distinctive features.[1] We used 9-point scales to elicit responses. These dimensions (in random order) include: (1) low- versus high-involvement; (2) entertainment versus purchase; (3) buying versus browsing; (4) self- versus social-driven; (5) hedonic versus utilitarian; (6) affective versus rational; (7) goal- versus non-goal-oriented; (8) low versus high price sensitivity; (9) low versus high time pressure; (10) necessary versus discretionary; and (11) intrinsically versus extrinsically motivated. Based on participants' ratings, we plotted a perceptual map to generate a visualization of the similarities and differences among the archetypes along the various dimensions (see Figure 2). Specifically, we generated a two-dimensional principal component representation based on the average score of each archetype on each of the 11 dimensions (see Table 3); we projected these 11 dimensions as vectors into the two-dimensional factor space, such that the projection of a particular shopper journey archetype on a dimension vector characterizes the extent to which the archetype relates to this dimension.

[1] We used the same descriptions of the twelve archetypes as in the first exploratory study (see item 7 in Web Appendix C) with one exception: for the *required* journey, we amended the description to "This shopping journey is typically regarded as required or essential for the purchase of necessary, utilitarian items, and could arise because of a role that the shopper plays in life" to reflect the enhanced characterization of the archetype.

--- Insert Figure 2 and Table 3 about here ---

Inspection of the eigenvalues in the perceptual map suggests a two-dimensional solution accounting for close to 75% of the variance between the archetypes (x-dimension: 53.7%; y-dimension: 21.2%). The position of each archetype (labeled in uppercase letters) within this two-dimensional space is indicated by a circular marker, whereas the radiating vectors represent the different dimensions along which the archetypes may differ. Broadly, the vectors suggest that the x-dimension captures goal-oriented versus non-goal-oriented (correspondingly, purchase vs. entertainment, utilitarian vs. hedonic, rational vs. affective) whereas the y-dimension relates to whether the shopping episode is self-driven or social-driven (correspondingly, whether it is intrinsically or extrinsically motivated).

A closer examination of the individual means of the shopper journey archetypes along the various dimensions reveals specific areas of similarity and difference between archetypes (see Table 3). For example, while some may consider impulsive shopping to be a form of retail therapy, our data suggest that compared to the *impulsive* journey archetype, the *retail therapy* journey archetype is associated with a higher degree of involvement and greater intrinsic motivation. In addition, the data highlight subtle differences between archetypes that may seem to occupy similar positions on the perceptual map (Figure 2). For instance, when compared to the *classic* journey archetype, the *required* journey archetype is associated with higher time pressure and lower price sensitivity, while the *routinized habit* journey archetype is associated with a lower degree of involvement.

Overall, the data from our second exploratory study not only validate the unique role of each shopper journey archetype, but also provide us with an improved understanding of how these archetypes are similar to, and different from, one another.

Illustration of Shopper Journey Archetypes and Shopper States

To further illustrate how these shopper journey archetypes relate to the proposed needs-based shopper journey model, thus demonstrating an application of the proposed model, next we dive deeper into four types of shopper journeys from the four quadrants of the journey archetype perceptual map and discuss the potential configuration of shopper-state transitions in each of these journeys.

Classic Journey. The *classic* journey is arguably the most stylized of the shopper journeys. As exemplified in the traditional purchase funnel model or the AIDA model (with AIDA being an acronym for the four proposed stages of the shopping process: Attention, Interest, Desire, and Action; Strong 1925), this journey includes most of the steps in the standard shopping process, from initial awareness to post-use product evaluation. These states are typically traversed in a linear fashion, progressing from one state to the next as the shopper converges on a particular brand or product to purchase. Despite the growing incidence of other shopper journeys, the *classic* journey is still very prevalent today, such as consumers' first-time purchase of a high-involvement product (e.g., furniture for a new apartment). The classic journey is highly associated with the rationality and utilitarian dimensions (see perceptual map in Figure 2).

Retail Therapy Journey. The *retail therapy* journey typically begins with the experience of negative mood (potentially driven by a perceived psychosocial deficiency) that leads to a desire to repair this aversive state. Shoppers often seek something to purchase for self-gratification, or may engage in mere browsing or window-shopping without any intention to purchase, so as to distract themselves from the negative feelings or immerse themselves within the arousing visual displays in the shopping environment. In the latter case, the available product

offerings may induce shoppers to make a purchase, which in turn attenuates the negative mood. In our exploratory study, the states that participants most associated with this shopper journey archetype are "Purchase" [70%], "Browse" [62%], "Explore" [56%], and "Intrigued" [50%]. Moreover, when compared to other archetypes, the *retail therapy* journey is more often associated with the "Validate" state in which consumers assess the extent to which their emotions have been repaired due to the shopping experience or to a particular purchase made, at which time they can "withdraw" from the shopping or consumption of the product (see Table 2). As shown in Figure 2, the *retail therapy* journey is associated with the lowest degree of price sensitivity, low time pressure, and high intrinsic motivation.

Social Network Journey. In the *social network* journey, peer-to-peer sharing is a central aspect of the shopping experience (see Table 2; in our exploratory study, 65% of the participants rated "Share" as a state that they would associate with this shopper journey, the most dominant of all states). Within their own social networks, consumers may share their initial product awareness and needs, invite comments from friends and family regarding items in their shopping cart or "saved" list, seek advice during product evaluation, and ultimately display their purchase and post-consumption evaluations through online reviews. Consistent with these tendencies, besides "Share," "Post-Use Evaluate" and "Advocate/Critique" are two others states that consumers tend to associate with the *social network* journey. The desire for consumers to share their consumption experience or their views about a product could be driven by a variety of motivations such as socializing, impression management, status seeking, and pure hedonic enjoyment and gratification (Dholakia, Bagozzi, and Pearo 2004; Ma and Chen 2014). This journey is associated with browsing and is perceived as discretionary with no specific goal (see Figure 2).

Gifting Journey. The *gifting* journey is motivated by a social goal of acquiring a gift for a social other such as a friend or relative. Shoppers embarking on this journey exhibit a broad spectrum of states, including "Explore" (62%), "Search" (70%), "Evaluate" (60%), and "Purchase" (82%) (see Table 2). The gifting journey has the highest purchase rate among all archetypes and presents a unique combination of high exploration (i.e., openness to ideas) and purchase, presumably due to the overarching goal of identifying and acquiring the "right" gift. As indicated in the perceptual map in Figure 2, the gifting journey is associated with the greatest degree of extrinsic motivation, time pressure, and involvement across the archetypes.

THEORETICAL AND PRACTICAL IMPLICATIONS

Our needs-adaptive shopper journey model, along with the proposed collection of shopper journey archetypes, facilitates theoretical and empirical analysis of consumer behavior beyond that available with other journey models. By focusing on shoppers' varying goals and motivations, our framework defines an integrative set of concepts and factors that guide future theoretical research as well as strategic decision making for marketers and retailers.

First, because many shopper journey archetypes do not necessarily end in a purchase (e.g., *entertainment* journey, *learning* journey, *social network* journey), theorizing can more closely match behaviors that we observe in the marketplace. For instance, many retailers create shopping experiences intended to go beyond the immediate purchase. Brands such as Apple and Harley-Davidson have established "showroom" retail outlets in major urban shopping locations designed to reinforce their desired brand image, while Nike's "Community Stores" have local employment and outreach goals, providing a richer texture to the relationship between retailer and customer (Buss 2016). Devices such as Google Home, Amazon Echo and Dash Buttons

facilitate repeat purchases and monitor how consumers use connected devices. In these instances, the retailer's primary goal in considering the shopper's journey is to strengthen the emotional and cognitive ties between the shopper and the brand, while discouraging search for competitive products with a "long game" view toward future purchases and repurchases.

Second, an improved understanding of shopper journey archetypes can allow a seller to effectively trigger a particular shopping archetype and make relevant CRM-system-based recommendations. For example, knowing that shopping archetypes involving others (e.g., *Gifting*, *Joint*) entail both affective Explore/Browse and cognitive Search/Evaluate/Decide states, marketers can design messages around key holidays (e.g., Christmas, Mother's Day, Father's Day) to present a range of relevant options for a customer to explore (e.g., based on the customer's demographic profile) with the necessary detailed information regarding the options for cognitive evaluation, and then separately entice the customer to purchase the examined items. Other sellers might specialize in appealing to the *impulsive* or the *opportunistic* shopper archetype, presenting attractive bargains for consumers in the style of a treasure hunt. In response to consumers' desire to be offered "…relevant recommendations I wouldn't have thought of myself" (Boudet et al. 2017), the seller could remind the *Classic*, *Required*, or *Routinized Habit* shopper archetype of the likely depletion of a utilitarian item that requires repurchase. In response to consumers' request that sellers "Talk to me when I'm in a shopping mode," the seller could infer a customer's mood through text analysis and propose that the *Retail Therapy* journey be undertaken as an antidote to the blues or boredom, offering a range of mood-lifting hedonic and experiential options.

Third, understanding the specific states involved in the different shopper journey archetypes allows marketers to strategically intercept consumers at particular stages during the

shopping process and maximize customer value. Such marketing actions are especially pertinent to the recent explosion in omnichannel retailing, or the seamless integration and synergistic management of various channels (e.g., online, offline, mobile, call center, direct sales force) in retailing to capitalize on their different respective strengths (Neslin and Shankar 2009; Verhoef, Kannan, and Inman 2015). Combining interactivity and instantaneity, mobile devices, for example, can be used to facilitate information lookup during "Search" and "Evaluate," or to communicate product options during the "Browse" and "Explore" stages so as to "Intrigue" consumers and induce buying. A case in point is Toyota's recent (2017) investment in Google's mobile advertising capability in the form of swipeable photos, in response to increases in searches on mobile phones – which saw an increase from 30% in 2016 among car buyers to 71% less than a year later. More broadly, mobile expert systems and "shopping concierges" (Shankar et al. 2016) can customize to consumers' specific shopper journey archetypes, providing a rich, interactive shopping experience.

Furthermore, the stochastic, non-linear model of shopping states provides a richer way to characterize and describe shopper journeys and to model "optimal" journeys. For instance, the *retail therapy* and *learning* journeys both involve "skipping" or "omitting" steps contained in the typical *classic* journey. New analytic methods will be needed to specify and test these journeys from a research perspective and determine which journeys are most likely to result in an ultimate sale. "Real time" analysis of a shopper's journey, based on an analysis of click-stream data, could be used to recommend that a shopper skip a step or two and go directly to "Decide" under the appropriate circumstances, or that the shopper "Evaluate" and postpone the decision for now. Recognizing that shopper journeys are non-deterministic (as opposed to the *classic* journey) provides marketers with a richer set of possible interventions to appeal to shoppers while

maximizing customer satisfaction. Moreover, understanding the prevalence of different shopper journey archetypes and their respective characteristics and constituent states can also help marketers to contextually prime specific goals and shift the goals that shoppers pursue and their resultant journeys. For example, mobile apps could exploit the conflict between some shoppers' deal-proneness in an *opportunistic* journey and their need for instant gratification in the *impulsive* journey by using triggers to focus their attention on paying more to obtain instant delivery rather than waiting for a price discount. Shifting shoppers who are already in an implemental mindset back to deliberation may be challenging in a brick-and-mortar environment, but mobile devices could make such switching feasible by providing instantaneous, context-sensitive information leading to abandonment or acceleration of previous shopping plans.

Finally, perhaps one of the most important aspects of our needs-adaptive shopper journey model is its greater emphasis on the social nature of many shopper journeys. Including "Advocate/Critique" and "Share" as explicit states in the model recognizes shoppers' propensity to seek advice and counsel before a purchase and validation after a purchase. While some might see these behaviors as a simple extension of the role of word-of-mouth advertising in previous consumer search models, the popularity of social media sites such as Pinterest and Instagram—which allow consumers to showcase to others their wish list of desired goods and services, and to engage in "strategic behavior" on review sites such as Yelp in order to influence merchants—suggests fundamental shifts in shopper behavior. Mobile devices, in particular, allow shoppers to constantly feel in touch with the external social environment, offering a convenient channel for them to connect with their social groups and the online community at large, while allowing marketers to continue engaging with shoppers through mobile-linked loyalty programs and

customization tools. Alternatives to the straightforward linear purchase model are needed in order to better describe and understand emerging shopper journeys.

QUESTIONS FOR FUTURE RESEARCH

We conclude this paper with a discussion of some potential research questions and directions arising from our conceptual needs-adaptive shopper journey model for future enquiry. We note that this is not intended to be an exhaustive list, but rather serve as a catalyst to spur research and thinking.

1. Which archetypes are more common, and what factors contribute to their incidence?

While we have considered twelve journey archetypes that consumers typically embark on in their shopping activities, these archetypes vary in their degree of incidence. Indeed, the results of our exploratory study indicate that the *classic* journey archetype (52%) was deemed as most representative of the majority of the recalled shopping trips in the previous month, with the *required* journey (13.8%) and the *opportunistic* journey (9.2%) emerging as the distant second and third most selected archetype (see the upper panel of Figure B.1 in the Web Appendix). A similar pattern emerged when participants were allowed to select more than one shopper journey archetype to describe their recent shopping trip, with 70.7%, 36.1%, and 25.3% choosing the *classic*, *required*, and *opportunistic* journeys respectively (see the lower panel of Figure B.1 in the Web Appendix).

However, when participants were asked to rate (1 = Not at all, 7 = All the time) how frequently they typically engaged in each of the 12 types of shopper journeys, the pattern of their responses was more balanced across the shopper journey archetypes, with the *classic* journey (M = 5.58, SD = 1.38), the *gifting* journey (M = 4.95, SD = 1.79), and the *routinized habit* journey

(*M* = 4.19, SD = 1.95) being the most common. Further, when participants were asked to rate (1 = Not at all, 7 = All the time) how frequently they thought the *average consumer* would engage in each of the shopper journeys, their ratings were even more balanced, ranging from the *entertainment* journey (*M* = 3.29, SD = 1.39) which they perceived as the least common, to the *classic* journey (*M* = 5.74, SD = 5.74) which they perceived as the most common.

Overall, while these results lend credence to the validity of the traditional purchase funnel model that is akin to the *classic* journey, they also highlight that other shopper journey archetypes are common in a consumer's life. Importantly, the rapidly evolving retail landscape (e.g., omnichannel retailing) may further influence the relative incidence of shopper journeys. For example, households have been found to be more brand- and size-loyal (and less price sensitive) when they shop for grocery products online compared to offline (Chu et al. 2010), suggesting that online shoppers are more likely to follow a *routinized habit* journey than shoppers in brick-and-mortar stores. Future research could thus look more deeply into the specific factors (e.g., environmental, social) that contribute to the incidence of these shopper journey archetypes, and how their incidence varies with time and with the myriad changes in the retail environment.

2. How do the shopper states and their transitions vary across archetypes?

In our discussion of shopper journey archetypes, we highlighted the potential state transitions for some of the archetypes to illustrate how these archetypes map onto our needs-adaptive shopper journey model. In our pilot study, we also explored how consumers' behavioral and psychological states varied across the different archetypes (see Table 2 and Table B.2 in the Web Appendix), and the similarities and differences among these archetypes across a variety of dimensions (see Table 3). These preliminary data suggest that there are substantial differences

across the various archetypes despite the apparent co-occurrence of some of them (see Table B.3 in the Web Appendix), lending further support to the value of conceptualizing and analyzing them separately. To better understand each of these archetypes, future research could look more closely into the component shopper states in each archetype—particularly the sequence of state transitions, as well as when and how the states transition from one to another—and how these transitions vary across archetypes.

3. What drives transitions from one archetype to another?

Related to the previous macro-level question on temporal changes in shopper journey archetypes, at a more micro level, a consumer's dominant shopper journey archetype could also change over time. Certain life events may result in natural shifts in one's dominant shopper journey archetype, such as the change from a *classic* journey to a *joint* journey as consumers spend more time with a significant other or after they start a family, or the switch from an *entertainment* journey or an *impulsive* journey to a *routinized habit* journey or a *classic* journey as consumers find themselves having less time and financial resources to spare due to mounting professional and family responsibilities. More interestingly, when does a consumer who predominantly follows a *routinized habit* journey migrate (or, perhaps, revert) to a *classic* journey? Or when does one transition from a *classic* journey to an *outsourced* journey? In what ways might external shocks and disruptions (e.g., the Equifax data breach) shift consumers' dominant shopper archetype from one to another? More generally, to what extent are particular archetypes that tend to co-occur with an archetype more natural candidates for such transitions (see Table B.3 in the Web Appendix)?

Strategically, retailers could anticipate and consider such likely sequences of shopper journeys and, accordingly, engineer appropriate shopping experiences for consumers. For

instance, a retailer who recognizes that a consumer has just completed a *learning* journey (e.g., searching the retailer's site and ordering a sample) may want to follow-up with the necessary tools for the consumer to complete a *classic* journey. On the other hand, consumers who are in a *routinized habit* journey may be ideal candidates to transition to an *outsourced* journey, again facilitated by the retailer. Recognizing the multiplicity of consumer journeys and their potentially sequential nature creates opportunities for retailers to add value to consumers.

Therefore, besides examining the antecedents of each shopper journey archetype, it might also be worthwhile from both a strategic and a consumer well-being perspective to probe deeper into the conditions under which one shopper journey archetype transitions to another. To address this, one could begin by looking at the specific shopping motivations that drive the incidence of the different shopper journey archetypes (see Table B.1 in the Web Appendix), or examine the characteristics of the different component shopper states in the archetypes (see Table 2 and Table B.2 in the Web Appendix).

4. How does customer experience integrate into the shopper journey archetypes?

In this work, we have focused on characterizing and describing consumers' shopping goals and needs in our conceptualization of a needs-adaptive shopper journey model and the various shopper journey archetypes. In line with our emphasis on maximizing consumer well-being, an essential question to address is whether the type of shopper journey would impact consumers' affective experience, and in turn, their overall shopping experience and satisfaction. Moreover, to what extent do the various types of changes in the retail environment influence not only how consumers shop, but also how they *feel* about their shopping experience? To what extent might the different shopper journey archetypes correspond to different shopper expectations, leading to the use of possibly different criteria for judging one's shopping

experience and satisfaction? Further, how would the shopping experience, in turn, affect the type of shopper journeys that people undertake? Hence, it would be worthwhile for future research to look into the relationship between shopping process and shopper experience, and possibly integrate existing frameworks of customer experience (Lemon and Verhoef 2016) with our needs-adaptive shopper journey model and the concomitant shopper journey archetypes.

5. *Are there any emerging shopper journey archetypes?*

While we have identified 12 shopper journey archetypes that capture the most typical shopping occasions commonly experienced by consumers, this list is clearly not exhaustive. With further knowledge, lifestyle, technological, and structural changes in the larger consumption environment, we expect other shopper journey archetypes to emerge in the future. Nonetheless, we believe that our proposed needs-adaptive shopper journey model provides a robust foundation from which new or emerging shopping journey archetype can be analyzed, and we hope that more researchers will participate in the important and exciting enterprise of seeking, examining, and understanding these new archetypes.

CONCLUSIONS

Motivated by the desire to incorporate the rich literature in marketing research and emerging trends in the retail industry into the study of shopping behavior, we proposed a needs-adaptive model of the shopper journey in this paper. With consumer well-being at its core and a focus on shopper motivations, this model complements and contrasts with existing models of the shopping process that may be less flexible and theoretically grounded. We believe that our proposed model has the flexibility to adapt to the evolving retailing landscape, characterized by significant ongoing knowledge, lifestyle, technological, and structural changes.

To further illustrate the workings and potential applications of the needs-adaptive shopper journey model, and to incorporate consumers' needs and motivations into our examination of shopping behavior, we identified twelve shopper journey archetypes that capture the most typical shopping processes that consumers experience in their daily lives. Besides discussing each of these archetypes and relating them to the extant research, we also explored their relationships with one another as well as the specific psychological states that consumers experience in these shopper journeys. We hope that our introduction of this model and its accompanying shopper journey archetypes, along with our discussion of the motivations underlying their conceptualization, will spur further work on this foundational topic in marketing and consumer research.

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Table 1.
Description of Shopper States in the Needs-Adaptive Shopper Journey Model

States	*Description*
Aware	To know, perceive, or be cognizant of the brands/products available for purchase and one's shopping environment.
Intrigued	To be curious about or interested in a particular brand, product, or some aspect of the shopping environment
Recognize need/want	To be aware of a functional need or hedonic desire for a particular product or category of products
Explore	To examine the available brands and products closely, usually with the goal of discovering new needs or purchase/consumption possibilities
Browse	To survey the brands and products on sale in a casual way, whether with or without a particular shopping goal in mind
Search	To look actively for a specific brand or product that one has in mind
Evaluate	To assess deliberatively the various brands or products in one's consideration set and how they align with one's needs, wants, and objectives
Decide	To make up one's mind about whether to buy, and if so, which particular brand or product to purchase
Purchase	To buy a brand or product item that one has decided upon
Wait	To remain in readiness until one is able to consume or utilize a product item (e.g., for a product purchased online to be shipped and delivered)
Use	To consume or utilize a product item that one has purchased
Post-Use Evaluate	To assess the strengths and weaknesses of a brand or product after using it
Advocate/ Critique	To support or promote a brand or product (e.g., through word-of-mouth or social media), or to critically analyze its strengths and weaknesses
Share	To invite others to participate in one's buying and consumption experience, or to participate in others' buying and consumption experience
Validate	To ascertain the strengths of a product or brand, or confirm that one has made the right purchase decision
Withdraw	To stop using a purchased product or to dispose of it

Table 2.
Relative Incidence of Shopper States for Shopper Journey Archetypes (General Shopping Trips)

	Classic	*Retail Therapy*	*Impulsive*	*Opportunistic*	*Social Network*	*Entertain-ment*	*Outsourced*	*Joint*	*Gifting*	*Required*	*Routinized Habit*	*Learning*	$\chi^2_{(11)}$
N	128	125	125	125	126	126	128	127	124	125	122	125	
Aware	**0.59**	*0.22*	*0.18*	**0.47**	0.34	*0.21*	0.31	0.40	0.43	0.41	**0.48**	**0.53**	99.79**
Intrigued	*0.12*	**0.50**	**0.54**	**0.59**	0.40	**0.67**	*0.09*	*0.24*	*0.24*	*0.05*	*0.08*	**0.66**	344.70**
Recognize Need/Want	**0.64**	0.32	*0.25*	0.45	*0.16*	*0.23*	0.45	0.35	0.32	**0.61**	**0.54**	*0.24*	144.88**
Explore	*0.31*	**0.56**	**0.57**	0.48	0.52	**0.66**	*0.27*	0.51	**0.62**	*0.14*	*0.17*	**0.78**	218.76**
Browse	0.48	**0.62**	0.54	0.54	0.43	0.52	*0.29*	**0.60**	**0.69**	*0.25*	*0.32*	**0.65**	115.88**
Search	**0.65**	*0.39*	*0.32*	0.48	0.40	*0.29*	0.41	0.56	**0.70**	0.48	0.42	**0.62**	93.71**
Evaluate	**0.59**	*0.29*	*0.26*	0.52	0.40	*0.37*	0.38	**0.64**	**0.60**	0.45	*0.30*	**0.77**	141.08**
Decide	**0.70**	*0.32*	*0.30*	0.52	*0.26*	*0.27*	0.38	**0.61**	**0.73**	**0.55**	0.47	*0.24*	173.64**
Purchase	**0.75**	**0.70**	**0.69**	0.64	*0.35*	0.54	*0.48*	0.57	**0.82**	**0.77**	**0.78**	*0.21*	202.48**
Wait	0.13	*0.05*	*0.04*	0.13	0.11	*0.07*	**0.24**	**0.24**	0.15	0.10	0.12	0.18	50.98**
Use	**0.45**	**0.45**	0.44	*0.27*	0.37	0.40	0.32	0.31	*0.11*	**0.48**	**0.53**	*0.27*	79.29**
Post-Use Evaluate	0.19	0.15	0.14	0.10	**0.21**	0.13	0.16	0.14	0.10	0.13	*0.07*	0.20	21.08*
Advocate/ Critique	*0.13*	*0.14*	*0.10*	*0.14*	**0.44**	0.17	**0.36**	**0.50**	*0.15*	*0.12*	*0.04*	**0.42**	194.64**
Share	*0.03*	*0.17*	*0.09*	*0.11*	**0.65**	0.23	**0.39**	**0.70**	**0.48**	*0.04*	*0.06*	0.20	402.38**
Validate	0.18	**0.37**	0.24	0.22	0.27	*0.17*	0.27	**0.46**	*0.15*	0.24	*0.17*	0.24	57.19**
Withdraw	0.03	**0.09**	0.05	0.02	0.01	*0.00*	0.04	0.02	0.01	0.03	0.03	0.05	25.65**

Note:- This paper reports the proportion of participants who rated the association of each of 16 states with the various shopper journey archetypes. Chi-square analyses comparing the proportions across the 12 archetypes for each state revealed that participants differed significantly in their likelihood of experiencing *all* 16 states as a function of the shopper journey archetype. Proportions that are statistically higher ($< p = .05$) than the average state proportion across all archetypes are indicated in **boldface**, while proportions lower than the average proportion across all archetypes are indicated in *italics*; χ^2 test of proportions for each state across archetypes – *: $p < .05$ **: $p < .01$

Table 3.
Mean Ratings of Shopper Journey Archetypes Along Various Dimensions

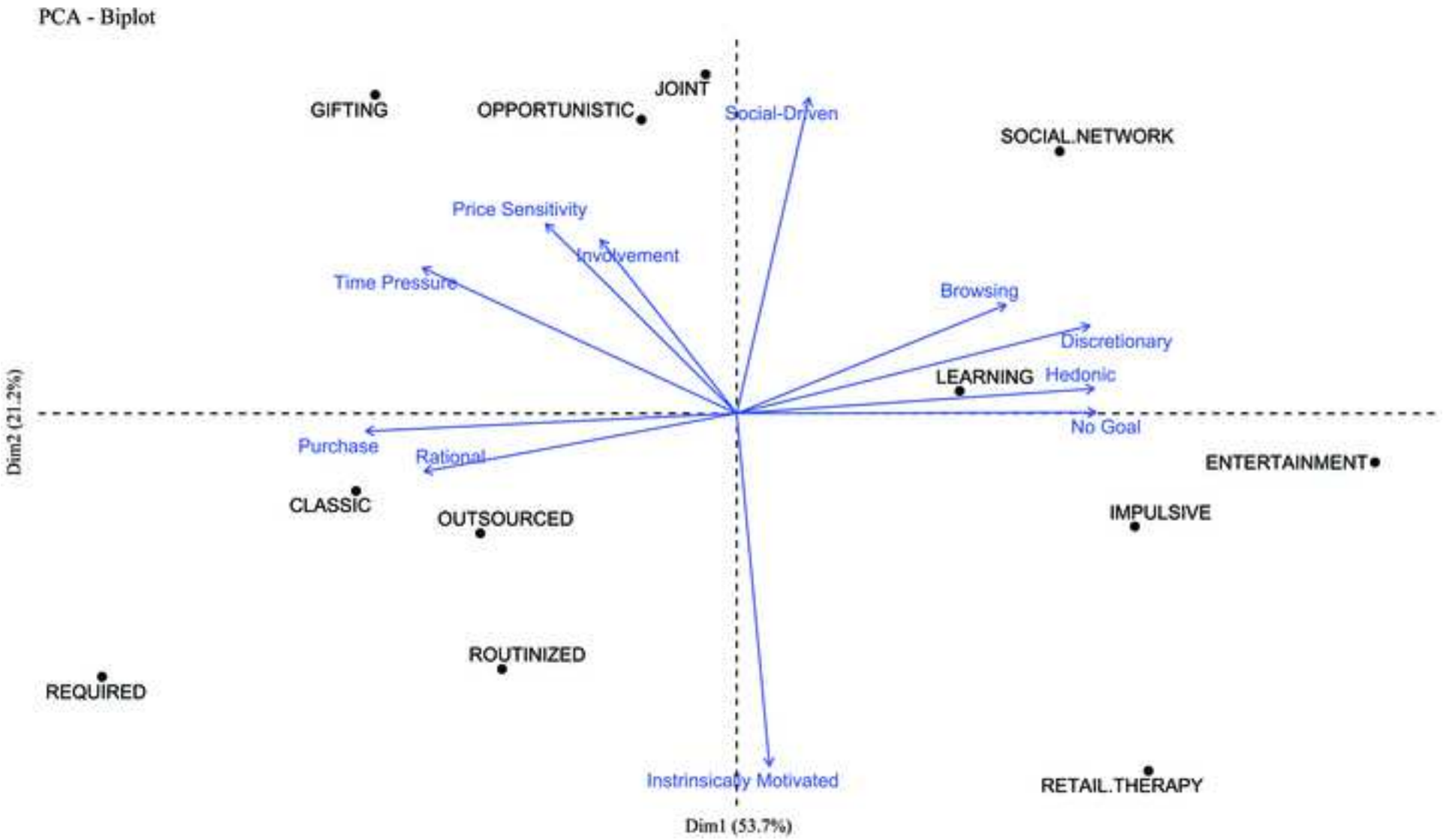
	Classic	*Retail Therapy*	*Impulsive*	*Opportunistic*	*Social Network*	*Entertain-ment*	*Outsourced*	*Joint*	*Gifting*	*Required*	*Routinized Habit*	*Learning*
N	44	44	43	44	42	44	44	42	44	45	43	43
Affective/ Rational	**6.59**** **(1.859)**	*2.18*** *(1.944)*	*2.19*** *(1.277)*	4.89 (2.305)	*2.93*** *(1.504)*	*2.55*** *(1.591)*	5.57 (2.500)	*4.29** *(2.437)*	*4.14*** *(2.485)*	**7.30**** **(1.746)**	**6.14**** **(2.199)**	**6.40**** **(2.238)**
Purchase/No purchase goal	*2.48*** *(1.732)*	**6.25**** **(2.934)**	**6.81**** **(2.353)**	4.75 (2.432)	**5.81**** **(2.211)**	**7.23**** **(1.828)**	2.61** (1.504)	*4.40** *(2.368)*	*2.26*** *(1.875)*	*2.20*** *(1.549)*	*3.86*** *(2.722)*	**7.12**** **(2.107)**
Low/High involvement	**6.89**** **(1.660)**	**5.68*** **(2.622)**	4.77 (2.338)	**6.32**** **(2.009)**	5.33 (1.720)	4.91 (2.311)	4.48 (2.547)	**6.64**** **(1.554)**	**7.26**** **(1.432)**	**5.77**** **(2.458)**	5.23 (2.534)	**5.95**** **(2.104)**
Low/High price sensitivity	**6.14**** **(1.786)**	*3.55*** *(2.028)*	*3.91*** *(2.369)*	**7.02**** **(2.162)**	*4.43*** *(1.670)*	4.59 (2.234)	4.77 (2.010)	5.13 (1.841)	5.17 (2.117)	4.59 (2.346)	5.56 (2.185)	**5.60*** **(2.002)**
Buying/ Browsing	*3.68*** *(2.270)*	*4.05*** *(2.917)*	*3.95*** *(2.768)*	4.52 (2.426)	5.55 (2.189)	**6.43**** **(2.396)**	*3.34*** *(2.188)*	4.87 (2.128)	*2.98*** *(2.404)*	*2.41*** *(1.945)*	*3.98*** *(2.824)*	**7.95**** **(1.588)**
Self-/Social-driven	*3.61*** *(1.883)*	*3.07*** *(2.396)*	*3.98*** *(2.405)*	4.48 (2.538)	**7.40**** **(2.073)**	4.91 (2.666)	5.45 (2.425)	**7.13**** **(1.727)**	**6.90**** **(2.207)**	*3.25*** *(2.070)*	*3.51*** *(2.086)*	*4.16*** *(2.663)*
Hedonic/ Utilitarian	**5.82**** **(1.632)**	*2.68*** *(1.749)*	*2.98*** *(1.739)*	5.05 (2.057)	*3.76*** *(1.665)*	*2.36*** *(2.047)*	**5.82**** **(2.015)**	4.96 (1.809)	**6.10**** **(1.722)**	**7.20**** **(1.837)**	**6.35**** **(2.080)**	5.33 (2.032)
Entertainment/ Purchase	**7.02**** **(1.517)**	*3.59*** *(2.714)*	*4.28*** *(2.711)*	**5.68**** **(2.122)**	*3.10*** *(1.694)*	*1.64*** *(0.990)*	**6.61**** **(2.115)**	5.11 (2.187)	**7.17**** **(2.197)**	**7.34**** **(1.916)**	**6.53**** **(2.303)**	*3.81*** *(2.217)*
Low/High time pressure	4.68 (2.176)	*3.05*** *(2.079)*	*3.86*** *(2.386)*	5.45 (2.454)	*3.81*** *(2.255)*	*2.39*** *(1.418)*	4.73 (2.500)	5.29 (2.242)	**6.40**** **(1.951)**	**5.61**** **(1.991)**	*4.23*** *(2.114)*	*3.02*** *(1.739)*
Necessary/ Discretionary	*3.77*** *(1.764)*	**7.11**** **(2.126)**	**7.40**** **(2.002)**	**6.11**** **(2.170)**	**6.62**** **(1.899)**	**7.52**** **(1.562)**	*3.86*** *(2.216)*	5.09 (1.975)	*4.26** *(2.732)*	*2.27*** *(1.717)*	*3.63*** *(2.401)*	**6.40**** **(1.761)**
Intrinsically/ extrinsically motivated	*4.20*** *(1.760)*	*2.64*** *(1.780)*	4.81 (2.657)	**6.39**** **(2.374)**	**6.33**** **(2.126)**	5.07 (2.286)	**5.64*** **(2.168)**	**5.87**** **(2.128)**	**6.38**** **(2.241)**	*4.14*** *(2.128)*	*4.02*** *(2.087)*	4.49 (2.676)

Note:- This table reports the means and standard deviations of participants' ratings of the 12 shopper journey archetypes along various dimensions. Entries in the first column indicate the descriptive anchors on the two ends of the bipolar scales; *: $p < .10$ **: $p < .05$; standard deviations in parentheses; means that are higher than the mid-point of the scale (5) are indicated in **boldface**, while those that are lower are in *italics.*

FIGURE CAPTIONS

Figure 1. The Needs-Adaptive Shopper Journey Model: This figure illustrates our proposed needs-adaptive shopper journey model. At the core of the model is shopper wellbeing, underscoring the model's emphasis on the importance of viewing shopping through a consumer-centric lens and the importance of focusing on shoppers' needs. The middle ring of the model consists of the various cognitive and behavioral *states* that a shopper can experience during the shopping journey. Finally, the model is flanked in the outermost ring by *four groups of factors* that influence a consumer's shopping process: the shopper's psychology, firm and retailer actions, social influence, and technology.

Figure 2. A Perceptual Map of Common Shopper Journey Archetypes: This figure illustrates the perceptual map that we plotted to obtain a visualization of the similarities and differences among the shopper journey archetypes (labeled in uppercase letters) along 11 bipolar dimensions: (1) low- versus high-involvement; (2) entertainment versus purchase; (3) buying versus browsing; (4) self- versus social-driven; (5) hedonic versus utilitarian; (6) affective versus rational; (7) goal- versus non-goal-oriented; (8) low versus high price sensitivity; (9) low versus high time pressure; (10) necessary versus discretionary; and (11) intrinsically versus extrinsically motivated. Specifically, we generated a two-dimensional principal component representation based on the average score of each archetype on each of the 11 dimensions (see Table 3).



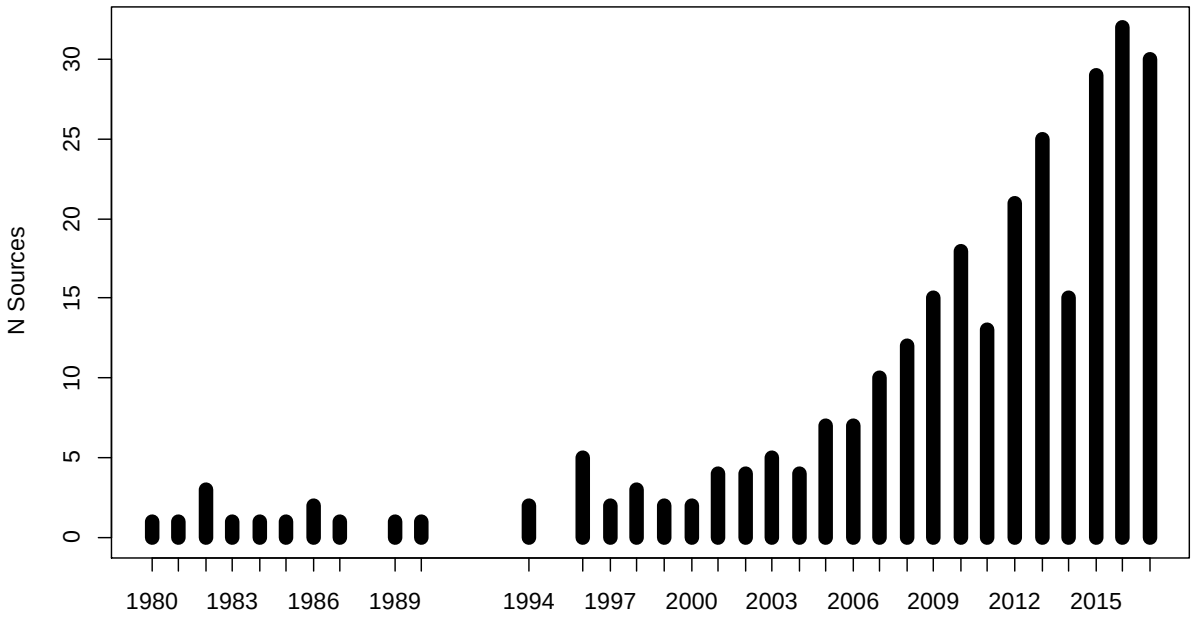
WEB APPENDIX A: REVIEW OF EXISTING MODELS

Describing the path that consumers take from the initiation of a shopping episode to the eventual purchase and consumption (or not) of a product or service and beyond is one of the oldest and most central topics of interest in marketing research. The development of models to represent this path to purchase dates back at least to the well-known AIDA model attributed to Elias St. Elmo Lewis in 1898 (Strong 1925), and has recently regained attention under the concept of a *customer journey* (e.g., Edelman and Singer 2015; Anderl et al. 2016; Lemon and Verhoef 2016). To provide an overview of this important research area and to better understand its structure and evolution over the years, we conducted a systematic review of scientific literature over the last thirty-seven years (i.e., starting from 1980).

Searching the SCOPUS database of published sources, we identified 280 sources (248 articles, 17 books, and 15 conference contributions) from 610 authors (or coauthors) in the business domain that included the term *sales funnel*, *customer journey*, or a synonym in the title, keywords, or abstract of the source.[1] Although the earliest sources in our review date back to 1980, interestingly, more than half of all the identified sources were published within the last six years. The heavily skewed distribution of published sources over time underscores the recent growing resurgence of this topic of research in marketing (see Figure A.1).

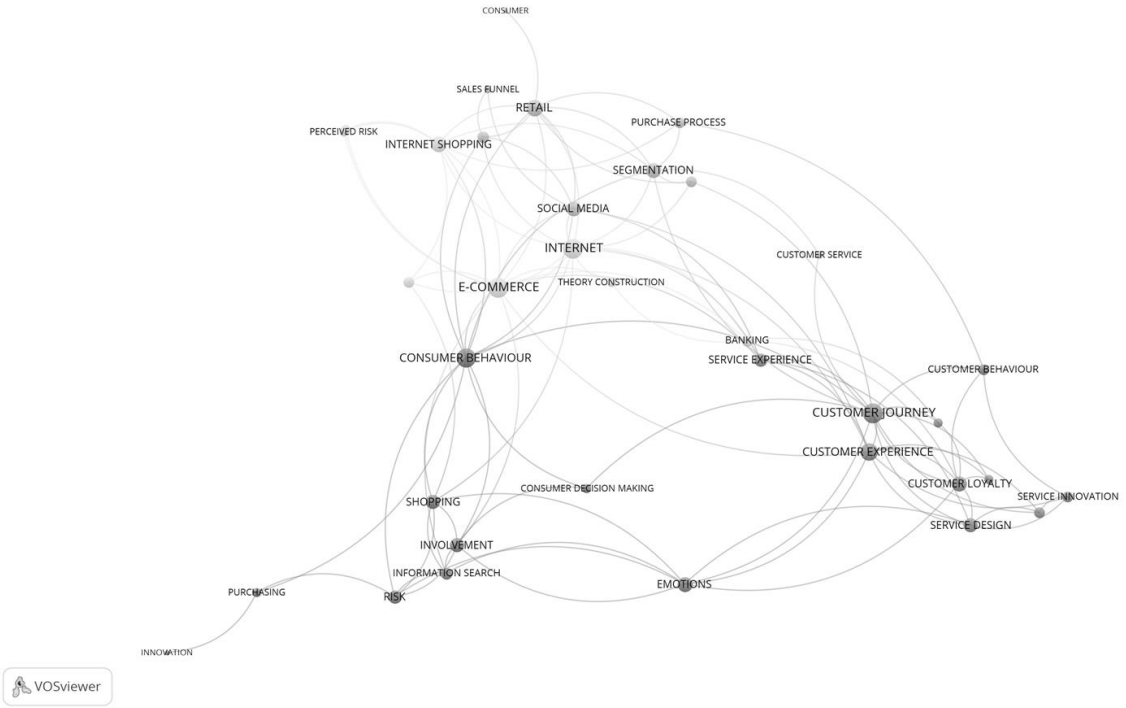
[1] The exact search string was: TITLE-ABS-KEY ("customer journey" OR "sales funnel" OR "consumer decision journey" OR "micro-moments" OR "purchase path" OR "purchase process" OR "shopping process") AND (LIMIT-TO (SUBJAREA , "BUSI"))

Figure A.1
Distribution of Sources over Time



To further structure this body of research and its historical development, we analyzed the keywords that authors chose to describe the sources in our sample (Su and Lee 2010; Mela, Roos, and Deng 2013). In total, we extracted 1,068 keywords from the sources and then calculated the frequencies with which each of these keywords co-occurred with the other keywords. This data were then used to visualize the knowledge structure of this body of research in a network plot and to identify clusters of frequently co-occurring keywords. Figure A.2 illustrates the resulting knowledge map and identifies four clusters, indicated by different colors. These clusters can be interpreted as separate streams of research in this literature. Next, we discuss each cluster in turn.

Figure A.2
Keyword Co-occurrence Map



Marketing strategy cluster. The first cluster includes the keywords "retail," "purchase process," and "segmentation," among others. This cluster may be interpreted as the historical core of research on the path to purchase from a marketing strategy perspective since it also includes the well-known sales-funnel model of the purchase process. This model is also known as the *AIDA model* with the name AIDA being an acronym for the four proposed stages of the shopping process: Attention, Interest, Desire, and Action (attributed to St Elmo Lewis in the late 1800s and early 1900s; Strong 1925). In this model, consumers are assumed to begin at the wide end of the funnel (see Figure A.3) with a general awareness of (or an initial attention to) a number of potential brands or products. Thereafter, consumers deliberate upon these brands carefully, derive their preferences among the various options, and finally, emerge at the narrow end of the funnel, buying their selected brand or product. From a marketing perspective,

analogous to the hierarchy-of-effects model (Lavidge and Steiner 1962), marketers attempt to "push consumers" through the funnel by directing their marketing actions strategically and systematically at the various telescoping stages of the shopping process as defined by the model, so as to influence consumers to eventually purchase their brands and products.

Figure A.3.
The Classic Purchase Funnel (AIDA) Model

Source: Belden 2013

Elegantly minimalistic, this classic model essentially treats all consumers as homogeneous and equal. While the model was applicable in the days of mass communication targeted at the general consumer, it is arguably too crude to capture the myriad existing and potential buyer-seller interactions during the contemporary shopping process. The number of brand/product options and retail channels in today's marketplace has ballooned, and consumers are increasingly well-informed and discerning. Critically, the model seems to put little emphasis on product or service customization, consumers' post-purchase experience, consumption

satisfaction, and repurchase – important factors to consider if marketers were to achieve the goal of building long-term consumer loyalty. Consequently, the traditional purchase funnel model is unable to capture the real, continued engagement that consumers have with their chosen brands, possibly resulting in missed opportunities for marketers and retailers.

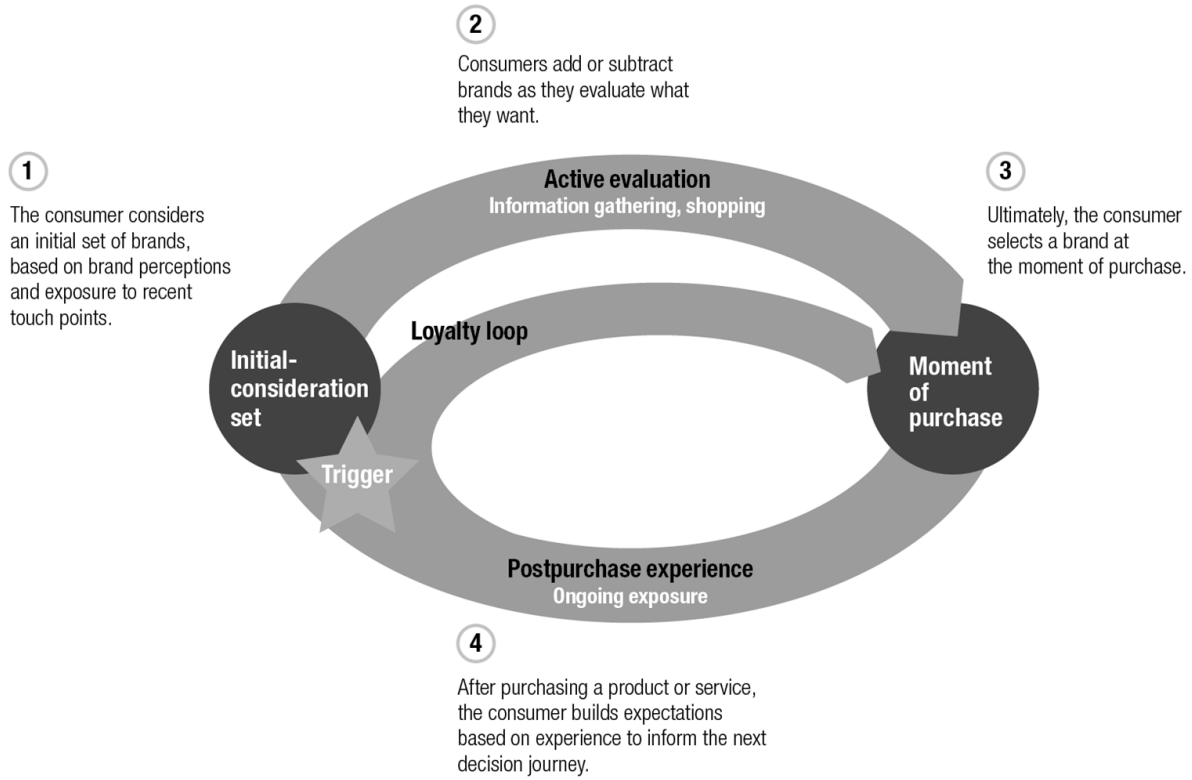
Recent additions to this stream of literature address the identified shortcomings by splitting customers into segments (Konuş 2008). Nonetheless, these revised models retain a strong focus on purchase as the ultimate goal of the marketing process.

Consumer behavior cluster. A second cluster revolves around consumer behavior more generally, and includes keywords such as "consumer decision making," "information search," "involvement," "risk," and "emotions." Sources in this cluster seem to extend the original view of the purchase funnel beyond a mere focus on selling and toward a stronger focus on consumers' perceptions, attitudes, and emotions. While some consumers may view the purchase of products merely as a way to get a certain job done (Bettencourt and Ulwick 2008; Ulwick and Bettencourt 2008; Christenson et al. 2016), many others may become invested in the purchase process and develop lasting attitudes and recurring habits.

For example, McKinsey proposed the CDJ (Consumer Decision Journey) model (Court et al. 2009). This model is essentially a circular model that begins with consumers' having an initial consideration set ("initial consideration" stage), similar to the starting point in the traditional purchase funnel model (see Figure A.4). Contrary to the funnel model, however, the CDJ model stipulates that consumers could continue to add options to, or remove options from, their initial consideration set while actively gathering information about other brands and products and evaluating what they want ("active-evaluation" stage). Eventually, consumers select a brand or product at the "moment of purchase," which in turn, kick-starts the "post-purchase-experience"

stage of the model. Consumers' post-purchase experience with the selected brand or product can then inform or alter their consideration set for the next shopping episode, and over time, this feedback loop forms the so-called *loyalty loop* where consumers habitually repurchase their selected brand. The loyalty loop is essentially routinized response behavior originally described by Howard and Sheth (1969).

Figure A.4.
McKinsey Customer Journey Model



Source: Court et al. 2009

A clear strength of the CDJ model over the traditional purchase funnel model is that the model acknowledges and incorporates the importance of technology in changing how consumers shop and evaluate brands and products. Moreover, the model emphasizes that it is vital for marketers to identify strategic touchpoints, so as to reach out to consumers at moments when

their decisions are most susceptible to external influence. Implicit in this emphasis on strategic "journey interruptions," as well as consumers' ability to expand or contract their consideration set during the active-evaluation phase, is the recognition that successful marketers engage in active two-way conversations with their customers. The balance between consumer-pull and company-push could serve to empower consumers in the long run and help build active, rather than passive, loyalists—a clear point of divergence from the more one-sided company-push focus in the traditional purchase funnel model.

In their continued effort to improve the model, McKinsey (Edelman and Singer 2015; see also Bommel, Edelman, and Ungerman 2014) recently proposed that by focusing on strategic actions in automation, proactive personalization, contextual interaction, and journey innovation, marketers can optimize the CDJ further by compressing the initial consideration stage, and shortening or even eliminating the entire active-evaluation stage. Such journey optimization and compression carry the positive effects of delivering consumers directly into the loyalty loop, thereby increasing psychological switching costs and locking consumers within the loop. In a model similar to McKinsey's CDJ model, Deloitte's disruptive path-to-purchase model incorporates the role of technology while including two new stages: imagining and sharing (Deloitte 2015).

Technology cluster. Linking the marketing strategy cluster with the consumer behavior cluster is a third cluster. This cluster captures keywords related to the Internet and e-commerce, highlighting how technological developments in the retail environment shape the path to purchase. For example, with the growing adoption of mobile technologies as part of consumers' shopping process, Google argues that a consumer's decision journey is essentially splintered into hundreds of tiny decision making moments at every stage of the traditional "funnel."

Consequently, marketers can interrupt and take action on any need or point of curiosity that consumers face at any of these moments, so as to influence and shape consumers' preferences. Google coined the term "micro-moments" to describe these critical touchpoints within the customer journey, calling for the need for marketers to be strategically present at these moments, and not just when a consumer is ready to purchase (Google 2015; Ramaswamy 2017). Google further organizes these micro-moments into four broad categories: "I-want-to-know" moments, "I-want-to-go" moments, "I-want-to-do" moments, and "I-want-to-buy" moments.

Compared to the funnel and the CDJ models, Google's concept of micro-moments more thoroughly embraces the power of the consumer in deciding when to engage with a brand during the shopping process. Moreover, micro-moments highlight the importance of recognizing the various states that consumers may be in within the shopping process, rather than conceptualizing the shopping process as comprising a sequence of steps or stages.

Experiential cluster. While the keywords listed with the previous three clusters used to dominate the path-to-purchase literature until about 2010, recent contributions have added a new perspective that focuses on experiential marketing (see Table A.1).

Table A.1
Comparison of Top 5 Keywords in the Path-to-Purchase Literature over Time

	1980 - 2010		2011 - 2017	
Top 1	Consumer Behavior	12	Customer Journey	20
Top 2	E-Commerce	8	Customer Experience	13
Top 3	Internet	7	Consumer Behavior	8
Top 4	Internet Shopping	4	E-Commerce	8
Top 5	Retail	4	Social Media	8
Total Keywords		*334*		*734*
Total Sources		*115*		*165*

The fourth cluster includes keywords related to the customer experience and the customer journey. Zomerdijk and Voss (2010) propose one of the earliest formal definitions of the customer journey as a series of touchpoints that "involves all activities and events related to the delivery of a service from the customer's perspective" (p. 74). As keywords, "customer journey" and "customer experience" often co-occur with perceptive constructs such as "customer satisfaction," service experience," and "customer loyalty." Furthermore, the cluster also includes keywords such as "service design" and "service innovation" that capture efforts to design and customize the customer experience proactively. For instance, one tool to capture existing customer experiences in order to design interventions is known as customer journey mapping (CJM). In essence, CJMs are a detailed visual depiction of customers' unique set of experiences with a particular company, brand, or product, incorporating both qualitative and quantitative details of the customers' experience. Specifically, each map adopts the consumer's perspective and focuses on the specific steps and activities that a customer might experience (e.g., ask for advice, review options), with these activities expressed in the same plain language that the customer might use, avoiding technical jargon and acronyms. These activities are further organized logically within larger processes (e.g., "ask"), facilitating the firm's ability to manage the customer activities effectively. With a comprehensive understanding of the full set of customer activities, marketers can then target the elements that matter the most to customers and create value for customers more effectively.

Conceptually, a CJM presents brands and firms with a powerful, dynamic tool they can use to improve customer experience, concurrently increasing their satisfaction and the firm's profits. However, preparing a comprehensive CJM that tailors to the specific needs of a brand or

firm entails considerable effort. Moreover, it is critical for the firm to monitor and update its CJM on a periodic basis so as to ensure their maps' continued relevance.

More recently, in response to the explosion of potential touchpoints through which consumers can interact with firms (see Baxendale, Macdonald, and Wilson 2015 for a discussion of touchpoints on brand consideration), and the recognition that customer journeys have become increasingly more complex (Rawson, Duncan, and Jones, 2013; Edelman and Singer 2015), Lemon and Verhoef (2016) present an updated perspective on the customer journey model. This revised model gives center stage to the concept of customer experience, which they define as a customer's cognitive, emotional, behavioral, sensorial, and social response to a firm's offerings," (p. 71, Lemon and Verhoef 2016; see also Verhoef et al. 2009) and which they suggest transcends a customer's journey with a given firm over time. This dynamic model presents three stages of the customer experience (i.e., pre-purchase, purchase, and post-purchase), all of which transpire not only during a current experience but also during past and future experiences. Central to their model is the inclusion of four categories of touchpoints that the authors represent as being influential at all three stages of the experience: brand-owned (i.e., firm controlled media and marketing mix elements), partner-owned (i.e., joint design, management or control by the firm and its partners), customer-owned (i.e., customer controlled elements that exclude the firm's control), and social/external (i.e., social environment). A more holistic and nuanced consideration of touchpoints in the customer journey is critical given that firms today are routinely forced to make resource allocation decisions across a wide range of touchpoints (Baxendale et al. 2015). Identifying the stage and proposing how touchpoints can be influential to the customer experience provides a more complete representation of the customer journey.

Nonetheless, similar to many of the preceding models, Lemon and Verhoef (2016) base their process model for customer journey and experience on a linear process, with purchase as the end goal. Their stylized model also does not take customers' potentially varying needs and motivation into consideration. Notably, the authors call for a need to identify "specific ways in which customers deviate from their habitual or expected customer journeys" (pp. 85) to achieve advances in customer journey mapping, and opine that "researchers could evaluate not only the journeys themselves but also what drives these journeys" (p. 88) especially with the ascendance of omnichannel marketing.

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WEB APPENDIX B: EXPLORATORY STUDY OF SHOPPER JOURNEY ARCHETYPES

Objectives

We designed this study to examine the extent to which the twelve proposed shopper journey archetypes adequately capture consumers' most typical shopping experiences, and the specific states in our needs-adaptive model of the shopper journey that describe consumers' shopping experience in each of the shopper journey archetypes. In addition, we wanted to explore how these shopper journeys relate to consumers' hedonic shopping motivations (Arnold and Reynolds 2003). Specifically, Arnold and Reynolds (2003) propose that shopping allows consumers to fulfill six different types of hedonic shopping motivations: adventure shopping, gratification shopping, role shopping, value shopping (or bargain/value hunting), social shopping, and idea shopping.

Method and Participants

A total of 502 respondents (47% male; average age = 38.2, ranging from 18 to 76) participated in this study on Mechanical Turk for $1, completing a survey. The survey employed a critical incident approach (Flanagan 1954) and was divided into four main parts (see Appendix B for the detailed instructions and questions in this survey). In the first part (Recalled Shopping Trip), participants were first asked to recall a recent shopping trip that they had made in the previous month and to describe their shopping experience in as much detail as possible. Next, they were given brief descriptions of the 12 shopper journey archetypes and asked to choose the archetype that best described the shopping episode they had just recalled. They were also asked to select all the archetypes that they thought would apply to their shopping trip if they could choose more than one archetype. In these two questions, participants were given an "others" option in which they could specify any archetypes that were not captured in the given list of 12

shopper journey archetypes. Subsequently, they were shown the 16 shopper states depicted in our needs-adaptive shopper journey model (see Figure 1 and Table 1) and asked to check all the states that they had experienced in the recalled shopping trip. Again, participants could specify any additional states that they had experienced and that were not captured in the list of 16 states.

In the second part of the survey (General Shopping Trips), participants were shown the 12 shopper journey archetypes again. They were first asked to rate how frequently they engaged in each of the 12 types of shopper journeys (1 = Never, 7 = All the time), and then to rate, using the same scale, how frequently they thought the *average consumer* engaged in each type of shopper journey.

In part three, participants were randomly assigned to three of the 12 shopper journey archetypes. For each shopper journey archetype, they were asked to choose as many of the 16 states in the needs-adaptive shopper journey model that they thought were typically involved in that type of shopper journey. In the final part of the survey, participants responded to the 18 items in the *Hedonic Shopping Motivations* scale (Arnold and Reynolds 2003) and answered some demographic questions.

Description of Figures and Tables for Study Results

The summaries of the results of the study are depicted in Figures B1-2 and Tables B1-3.

Figure B.1: The upper panel illustrates the relative frequencies of the dominant shopper journey archetype that participants self-selected to best capture the recalled shopping trip that they had made within the past month. The lower panel illustrates the relative frequencies of the shopper journey archetypes that participants rated to best describe this shopping trip when participants could select more than one representative archetype.

Figure B.2: The upper panel illustrates participants' ratings (1 = Not at all, 7 = All the time) of how frequently they engaged in each of 12 types of shopper journey. The lower panel illustrates participants' ratings, using the same scale, of how frequently they thought the average consumer engaged in each type of shopper journey.

Table B.1: This table reports the results of a series of linear regressions, where each regression regresses the 502 participants' self-reported frequency of engaging in one of the 12 types of shopper journeys (dependent variable) on their self-reported dispositional hedonic shopping motivations (i.e., six types of motivations), controlling for age and sex. While at first glance it seems odd that none of the shopping motivations predicted self-reported frequency of either the *classic* journey or the *routinized* habit journey, recall that these two types of shopper journeys are primarily functional and non-hedonic while the tested motivations are hedonic.

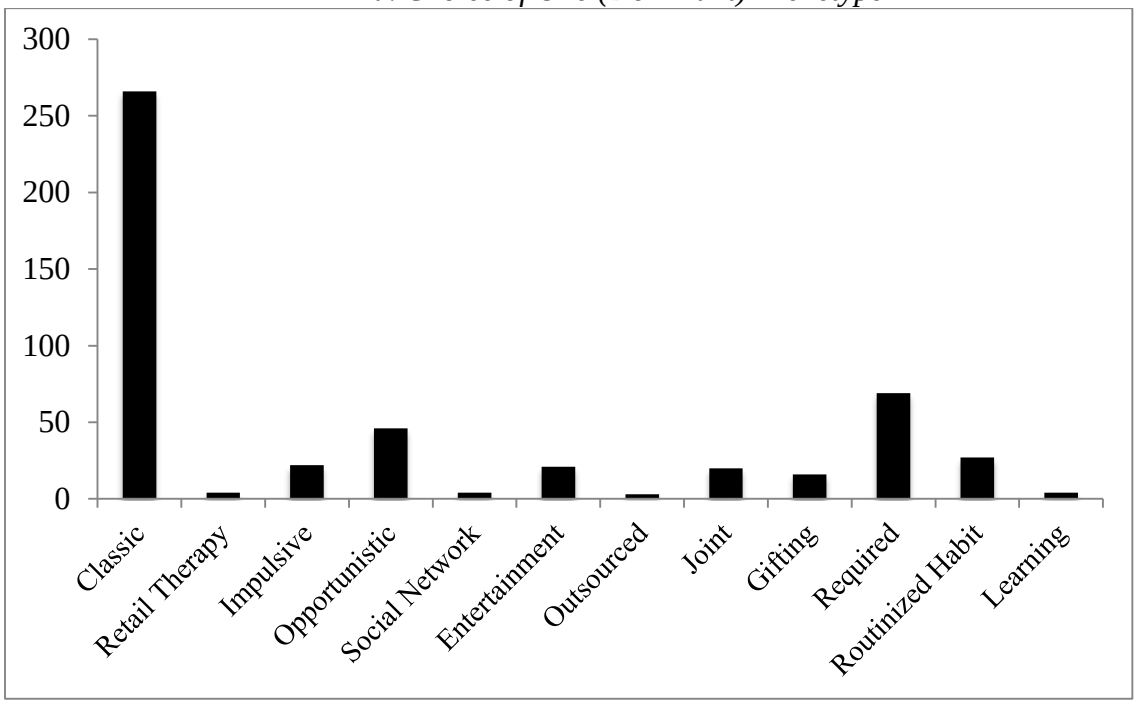
Table B.2: This table complements Table 2 in the main text and reports the proportion of participants who rated the association of each of 16 states with their recalled shopping trip (that they had self-categorized into one or more shopper journey archetypes). For example, for the first entry in the table (0.58), 58% of participants chose the "aware" state to be typically involved in the *classic* journey. Chi-square analyses comparing the proportions across the 12 archetypes for each state revealed that participants differed significantly in their likelihood of experiencing 10 of the 16 states as a function of the shopper journey archetype.

Table B.3: This table reports the co-occurrence of the various shopper journey archetypes based on participants' self-categorization of the shopping trip that they had made in the previous month and recalled in the survey. For example, the entry -0.370 corresponding to the "Classic"/"Impulsive" cell indicated the phi coefficient or the degree of association between a

classic journey and an *impulsive* journey; in this instance, the *classic* journey is negatively associated with the *impulsive* journey at a statistical significance level of less than 1%.

Figure B.1
Frequency of Shopper Journey Archetype (Recalled Shopping Trip)

a. Choice of One (Dominant) Archetype



b. Choice of Multiple Archetypes

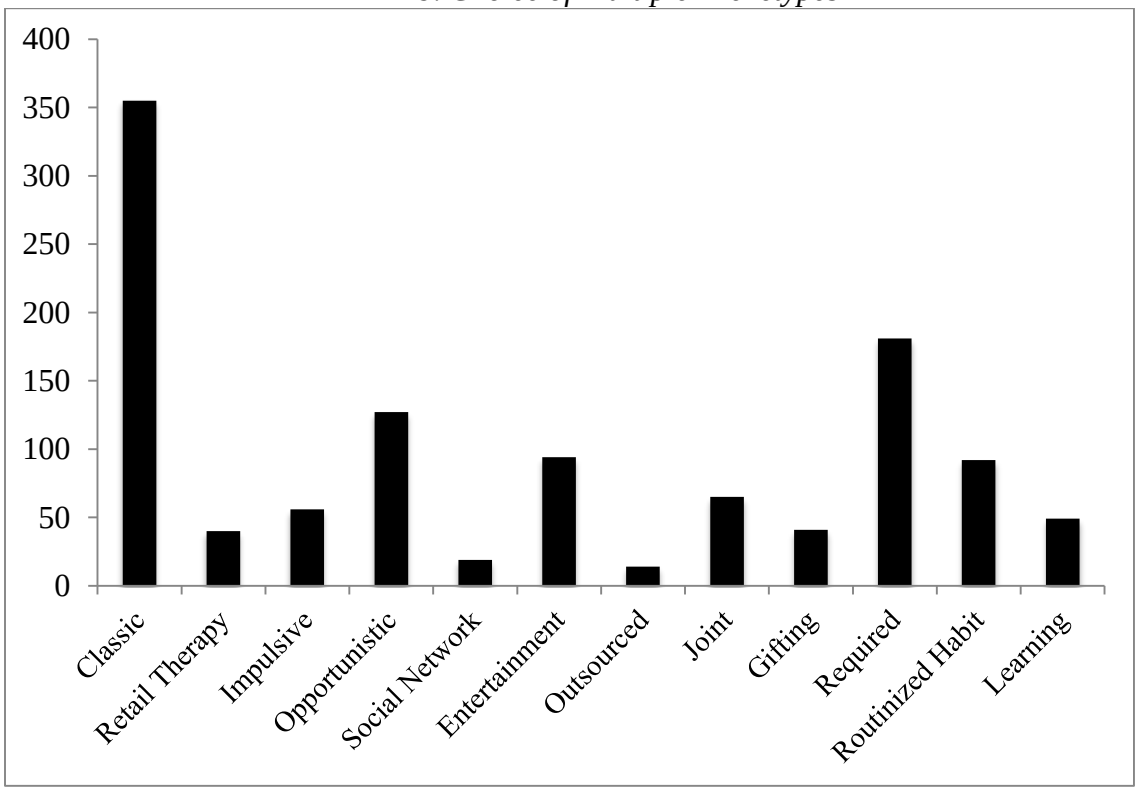
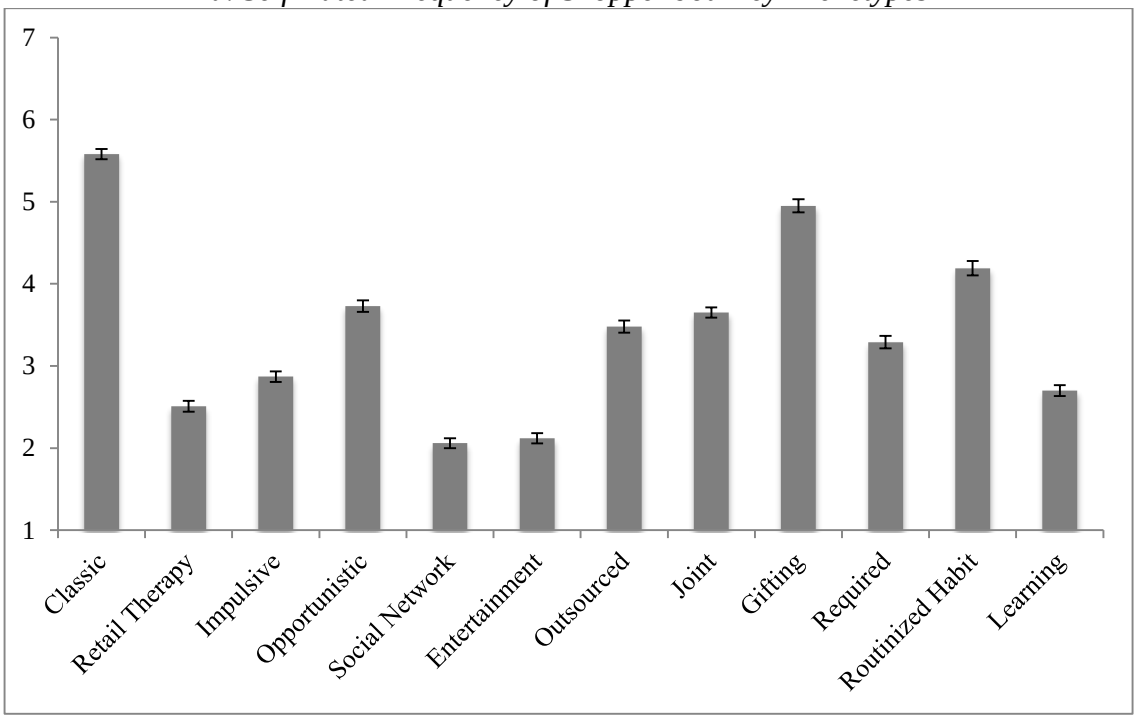
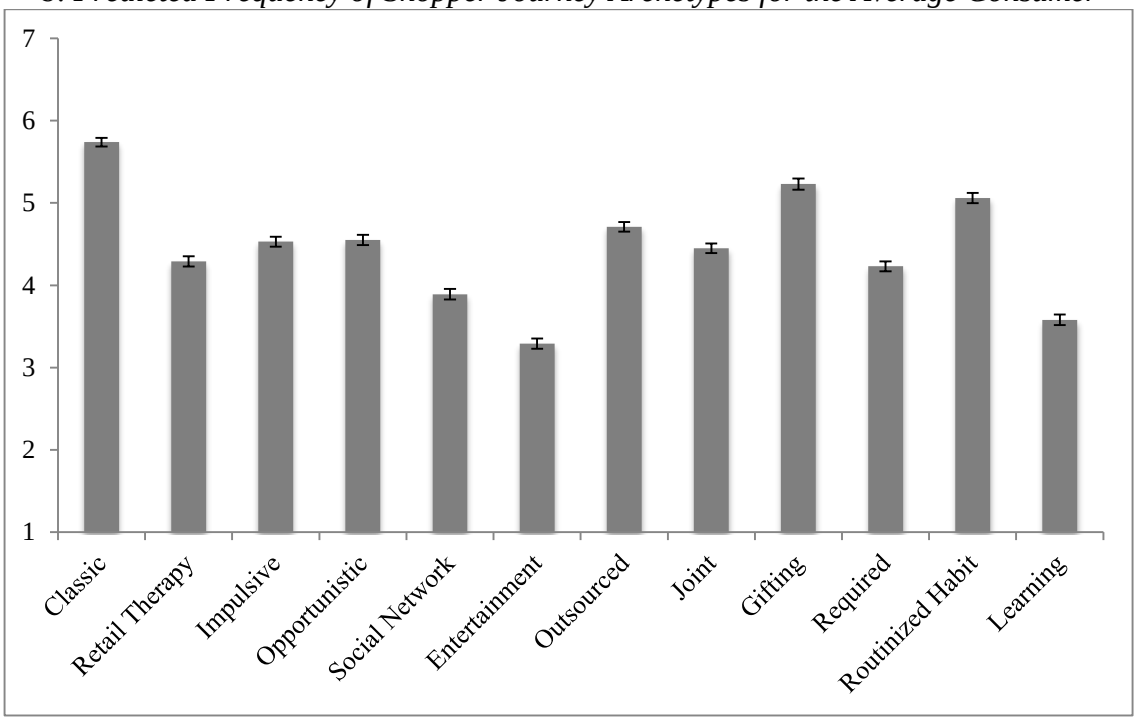


Figure B.2
Frequency of Shopper Journey Archetype (General Shopping Trips)

a. Self-Rated Frequency of Shopper Journey Archetypes



b. Predicted Frequency of Shopper Journey Archetypes for the Average Consumer



Note:- Error bars denote standard errors

Table B.1.
Regressions of Self-Reported Frequency of Shopper Journeys on Hedonic Shopping Motivations

Dependent variable	*Classic*	*Retail Therapy*	*Impulsive*	*Opportunistic*	*Social Network*	*Entertain-ment*	*Outsourced*	*Joint*	*Gifting*	*Required*	*Routinized Habit*	*Learning*
Adventure Shopping	-0.007	0.025	0.004	**0.051****	0.004	**0.083*****	0.003	-0.017	-0.017	-0.050	0.027	0.078***
	(0.024)	(0.020)	(0.022)	**(0.025)**	(0.021)	**(0.025)**	(0.023)	(0.028)	(0.022)	(0.031)	(0.033)	(0.024)
Gratification Shopping	-0.012	**0.146*****	**0.127*****	0.002	**0.061*****	0.043*	0.032	-0.015	0.016	0.011	0.000	0.008
	(0.023)	**(0.019)**	**(0.022)**	(0.024)	**(0.020)**	(0.024)	(0.022)	(0.027)	(0.021)	(0.030)	(0.032)	(0.023)
Role Shopping	0.003	0.023*	-0.009	0.005	0.020	0.016	**0.039****	0.036*	**0.105*****	0.000	-0.014	-0.022
	(0.016)	(0.013)	(0.015)	(0.017)	(0.015)	(0.017)	**(0.016)**	(0.020)	**(0.015)**	(0.021)	(0.023)	(0.017)
Value Shopping	0.024	-0.023*	-0.009	**0.085*****	-0.028*	-0.005	-0.022	0.027	-0.011	0.039*	0.012	0.002
	(0.017)	(0.014)	(0.016)	**(0.018)**	(0.015)	(0.018)	(0.016)	(0.020)	(0.016)	(0.022)	(0.024)	(0.017)
Social Shopping	-0.016	-0.018	0.020	0.015	**0.063*****	**0.073*****	**0.034****	**0.078*****	0.023	-0.009	0.021	**0.041****
	(0.017)	0.014	(0.016)	(0.018)	**(0.015)**	**(0.017)**	**(0.016)**	**(0.020)**	(0.016)	(0.022)	(0.023)	**(0.017)**
Idea Shopping	0.006	**0.021****	0.001	0.012	0.010	-0.005	0.013	0.011	0.003	**0.033****	0.023	0.006
	(0.011)	**0.009**	(0.010)	(0.012)	(0.010)	(0.011)	(0.010)	(0.013)	(0.010)	**(0.014)**	(0.015)	(0.011)
Sex (1=M, 0=F)	-0.182	**-0.269****	0.046	0.237*	0.147	**0.356****	**0.305****	-0.056	-0.023	-0.131	-0.220	**0.292****
	(0.131)	**0.107**	(0.123)	(0.139)	0.116	**(0.137)**	**(0.124)**	(0.156)	(0.122)	(0.170)	(0.184)	**(0.133)**
Age	0.006	0.005	-0.002	0.008	-0.002	-0.007	**-0.010****	-0.006	**0.010****	0.007	0.010	0.010*
	(0.005)	0.004	(0.005)	(0.006)	(0.005)	(0.005)	**(0.005)**	(0.006)	**(0.005)**	(0.007)	(0.007)	(0.005)

Note:- Non-parenthesized values denote unstandardized regression coefficients; parenthesized values denote standard errors;
*: $p < .10$ **: $p < .05$ ***: $p < .01$; regression coefficients that are statistically significant at the $p = .05$ level are indicated in **boldface**.

Table B.2.
Relative Incidence of Shopper States for Shopper Journey Archetypes (Recalled Shopping Trip)

	Classic	*Retail Therapy*	*Impulsive*	*Opportunistic*	*Social Network*	*Entertain-ment*	*Outsourced*	*Joint*	*Gifting*	*Required*	*Routinized Habit*	*Learning*	$\chi^2_{(11)}$
N	355	40	56	127	19	94	14	65	41	181	92	49	
Aware	0.58	0.43	0.43	0.59	0.53	0.5	0.64	0.48	0.51	0.56	**0.64**	0.59	14.80
Intrigued	*0.15*	0.35	**0.48**	0.34	0.26	**0.45**	0.36	0.25	0.27	*0.13*	*0.13*	0.31	85.25**
Recognize Need/Want	**0.62**	0.53	0.52	0.55	0.58	0.53	0.64	0.6	0.44	0.6	0.6	0.55	9.68
Explore	*0.4*	0.53	0.55	0.54	0.68	0.57	0.64	0.6	0.68	*0.33*	*0.3*	**0.69**	67.41**
Browse	*0.61*	0.78	0.79	0.65	0.58	0.62	0.64	0.75	0.8	*0.57*	0.63	0.73	24.62*
Search	0.67	0.68	0.57	0.65	0.53	0.62	0.71	0.71	**0.8**	0.66	0.61	0.67	10.25
Evaluate	0.59	0.43	*0.41*	0.57	0.53	0.45	0.64	0.63	0.51	0.55	0.55	**0.69**	20.48*
Decide	**0.72**	0.7	0.73	0.73	0.74	0.71	0.71	**0.78**	0.71	0.65	0.61	0.76	10.08
Purchase	0.92	0.85	0.88	0.89	0.89	0.88	0.86	0.92	0.95	0.88	0.88	0.92	6.54
Wait	0.19	0.3	0.21	0.17	0.32	0.19	0.36	0.22	0.27	*0.15*	0.26	0.14	13.99
Use	*0.21*	0.28	0.27	0.24	0.26	0.32	**0.64**	0.25	0.24	*0.19*	0.25	0.31	21.13*
Post-Use Evaluate	*0.06*	0.18	0.13	0.09	0.16	0.15	**0.43**	0.11	0.12	*0.05*	0.09	0.14	35.56**
Advocate/ Critique	*0.08*	0.13	0.09	*0.07*	0.16	0.09	**0.36**	**0.22**	0.17	*0.07*	0.09	0.08	28.58**
Share	*0.07*	0.13	0.16	0.1	0.21	0.13	0.29	0.25	0.15	*0.04*	0.1	0.16	36.65**
Validate	*0.1*	0.23	0.21	0.15	0.26	0.19	**0.5**	0.18	0.2	*0.12*	*0.11*	0.24	32.97**
Withdraw	*0.02*	0.08	0.07	*0.03*	0.16	0.05	0.21	0.05	0.1	*0.03*	0.05	0.06	29.81**

Note:- Proportions that are statistically higher (< p = .05) than the average state proportion across all archetypes are indicated in **boldface**, while proportions lower than the average proportion across all archetypes are indicated in *italics*; χ^2 test of proportions for each state across archetypes – *: $p < .05$ **: $p < .01$

Table B.3.
Co-occurrence of Shopper Journey Archetypes

	Classic	*Retail Therapy*	*Impulsive*	*Opportunis -tic*	*Social Network*	*Entertain -ment*	*Outsourced*	*Joint*	*Gifting*	*Required*	*Routinized Habit*	*Learning*
Classic	1	-0.037	**-.370****	**-.240****	-0.079	**-.230****	0.029	-0.065	-.096*	0	0.067	-0.01
Retail Therapy	-0.037	1	**.106***	0.049	**.134****	**.104***	**.174****	0.062	0.073	**-.114***	-0.006	**.176****
Impulsive	**-.370****	**.106***	1	0.085	**.129****	**.252****	**.132****	.146**	0.01	**-.108***	-0.053	-0.01
Opportunistic	**-.240****	0.049	0.085	1	0.053	0.073	0.068	-0.02	0.061	**-.227****	**-.134****	0.009
Social Network	-0.079	**.134****	**.129****	0.053	1	0.065	**.283****	0.079	**.170****	-0.062	0.014	0.075
Entertainment	**-.230****	**.104***	**.252****	0.073	0.065	1	0.074	0.028	0.062	**-.212****	-0.069	0.031
Outsourced	0.029	**.174****	**.132****	0.068	**.283****	0.074	1	**.115***	**.170****	0.049	0.045	**.107***
Joint	-0.065	0.062	**.146****	-0.02	0.079	0.028	**.115***	1	0.037	-0.055	-0.06	0.053
Gifting	**-.096***	0.073	0.01	0.061	**.170****	0.062	**.170****	0.037	1	-0.072	-0.066	0.049
Required	0	**-.114***	**-.108***	**-.227****	-0.062	**-.212****	0.049	-0.055	-0.072	1	0.084	-0.065
Routinized Habit	0.067	-0.006	-0.053	**-.134****	0.014	-0.069	0.045	-0.06	-0.066	0.084	1	-0.034
Learning	-0.01	**.176****	-0.01	0.009	0.075	0.031	**.107***	0.053	0.049	-0.065	-0.034	1

Note:- *: $p < .05$ **: $p < .01$; correlations that are statistically significant at the $p = .05$ level are indicated in **boldface**

WEB APPENDIX C: DETAILED INSTRUCTIONS AND QUESTIONS IN SURVEY FOR EXPLORATORY STUDY

Thank you for participating in this survey. This survey consists of a number of short questions that will take around 15–20 minutes to complete. Please read the questions carefully and answer them to the best of your ability. There are no right or wrong answers, and your responses will be kept confidential. We just want to know your true experiences and opinions. Thank you for your cooperation and participation.

We would like you to recall a shopping trip that you made or a shopping episode you had in the last one month.

1. Where did you go? Did you shop in a physical store or mall? Online? Using your mobile phone? Or did you use a combination of these channels? (Please choose all options that apply.)
    - o I shopped in a physical store or mall.
    - o I shopped online using my computer, laptop and/or tablet.
    - o I shopped using my mobile phone.
    - o Others (please specify in the text box below)

2. What did you buy?

3. How much did you spend? Please enter a number. If you do not remember the exact amount, please give your best estimate.

4. How long did your shopping take (in minutes)?

5. Did you shop alone? If not, whom did you shop with?
    - o Yes, I shopped by myself the entire time.
    - o No. Although I shopped by myself in the store, I was connected to others *friends or family) and got their input during the shopping trip via my phone.
    - o No, I shopped with others (please specify the number of people with you and your relationship in the text box below).

6. Now, **we would like you to describe your entire shopping experience in as much detail as possible.** For example, you might wish to consider the following questions: Did you have a specific goal or a specific product (or products) in mind before you went shopping? Did you search for any information before you went shopping? How would you describe your shopping process when you were in the store? Did you talk or interact with anyone when you were shopping? How much did you enjoy the shopping process overall? Why, or why not?

7. A particular shopping journey can be described using one of many difference archetypes. Consider the following different shopper journey archetypes:
    - **Classic journey**: This shopping journey describes a standard shopping process, characterized by an initial awareness or identification of a need (or needs), consideration of various brands or product options, and eventual choice and purchase of a particular brand/product.
    - **Retail therapy journey**: This shopping journey is motivated by the desire to feel better after experiencing negative emotions.
    - **Impulsive journey**: This shopping journey is typically undertaken without any pre- shopping goals in mind, often resulting in impulse or unplanned purchases.
    - **Opportunistic journey**: This shopping journey is motivated by certain opportunities (for consumers) that arise from the external environment, such as a sales promotion or the launch of a

range of limited-edition products.

- **Social network journey**: This shopping journey typically arises because of interactions that consumers have with members of their social networks.
- **Outsourced journey**: This shopping journey typically involves delegation of a part of (e.g., product recommendation) or the entire shopping process to social others, such as a close friend or family member, a domestic helper, or a personal shopper.
- **Entertainment journey**: This shopping journey is undertaken primarily for hedonic, recreational purposes.
- **Gifting journey**: This shopping journey is motivated by the need or desire to buy a gift for others.
- **Required journey**: This shopping journey is typically regarded as required or essential because of a role that the shopper plays in life.
- **Joint journey**: This shopping journey is undertaken in close consultation with one or more fellow-shoppers (e.g., a significant other), such as the eventual buying decision is determined by a group of individuals.
- **Routinized habit journey**: This shopping journey is essentially a habitual routine undertaken at regular points in time.
- **Learning journey**: This shopping journey is driven by the desire to learn about trends and changes in the marketplace such as what brands/products/stores are newly available, which brands/products/stores are popular, etc.

Which one of these shopping journey archetypes best describes the shopping episode that you just recalled?

8. Here are the 12 shopper journey archetypes that you just saw again: *descriptions of the shopper journey archetypes repeated as above*. Suppose that you could choose **more than one** of these shopper journey archetypes. Which of these archetypes best describe(s) the shopping episode that you just recalled?

9. Which of the following behaviors, activities, or cognitive states below did you experience in the shopping episode that you recalled earlier? (Please choose one or more responses. If there were certain behaviors, activities, or cognitive states that you experienced during your shopping episode missing from the given list below, please specify.)

o Aware	o Intrigued	o Recognise need/want	o Explore
o Browse	o Search	o Evaluate	o Decide
o Purchase	o Wait	o Use/Consume	o Post-use evaluate
o Advocate/Critique	o Share	o Validate	o Withdraw
o Others (please specify)			

10. Please review the 12 shopper journey archetypes that you saw earlier again: *descriptions of the shopper journey archetypes repeated as above*. For each shopper journey archetype, <u>how frequently</u> do you find yourself engaging in this type of shopping? (Again, there are no right or wrong answers. We just want to know your true experience.) (7-point scale: 1 – Never, 7 – All the time)

11. Please review the 12 shopper journey archetypes that you saw earlier again: *descriptions of the shopper journey archetypes repeated as above*. For each shopper journey archetype, how frequently do you think <u>the average consumer</u> would engage in this type of shopping? (Again, there are no right or wrong answers. We just want to know your true opinion.) (7-point scale: 1 – Never, 7 – All the time)

12. Are these any shopper journey archetypes that you can think of that are <u>not</u> captured by the given list of 12 archetypes? Please describe.

13. Next, we would you to consider three specific shopping journey archetypes *(randomly assigned)*. For each shopper journey archetype, please choose all the behaviors, activities, and cognitive stages that you think are typically involved in this type of shopper journey.
    - ○ Aware
    - ○ Browse
    - ○ Purchase
    - ○ Advocate/Critique
    - ○ Others (please specify)
    - ○ Intrigued
    - ○ Search
    - ○ Wait
    - ○ Share
    - ○ Recognise need/want
    - ○ Evaluate
    - ○ Use/Consume
    - ○ Validate
    - ○ Explore
    - ○ Decide
    - ○ Post-use evaluate
    - ○ Withdraw

14. Please indicate how much you agree or disagree with each of the following statements (7-point scale: 1 – Strongly disagree, 7 – Strongly agree):
    - To me, shopping is an adventure.
    - I find shopping stimulating.
    - Shopping makes me feel like I am in my own universe.
    - When I'm in a down mood, I go shopping to make me feel better.
    - To me, shopping is a way to relieve stress.
    - I go shopping when I want to treat myself to something special.
    - I like shopping for others because when they feel good I feel good.
    - I enjoy shopping for my friends and family.
    - I enjoy shopping around to find the perfect gift for someone.
    - For the most part, I go shopping when there are sales.
    - I enjoy looking for discounts when I shop.
    - I enjoy hunting for bargains when I shop.
    - I go shopping with my friends or family to socialize.
    - I enjoy socializing with others when I shop.
    - Shopping with others is a bonding experience.
    - I go shopping to keep up with the trends.
    - I go shopping to keep up with the new fashions.
    - I go shopping to see what new products are available.

15. In general, how much do you enjoy shopping? (7 point scale: 1 – Not at all, 7 – Very much)

16. How frequently do you shop? (7 point scale: 1 – Not at all, 7 – A lot)

17. What is your gender? (Male, Female)

18. Please provide, as accurate as possible, the following information. Again, please note that your responses are completely confidential and providing this information accurately will greatly help our academic research study. Thanks!
    - Your age
    - Total annual household take-home income (after taxes)
    - Your monthly discretionary income (i.e., money not specifically needed for paying bills)

19. Which of the following categories best describes you?
    - ○ Some high school
    - ○ High school graduate
    - ○ Some college
    - ○ College graduate
    - ○ Postgraduate/professional graduate

FROM BROWSING TO BUYING AND BEYOND:

THE NEEDS-ADAPTIVE SHOPPER JOURNEY MODEL

A Non-Technical Summary

When do consumers decide to buy after browsing in a store or receiving information about a product or brand? Why and how do they shop in the first place? The importance of these questions for retailing and marketing is underscored by the presence of numerous models and frameworks that academic researchers and management consultants have proposed to characterize how consumers shop. Nonetheless, significant knowledge, lifestyle, technological, and structural changes in the consumption environment have emerged over the past two decades. These changes have drastically altered the shopping patterns and behaviors of consumers, presenting new opportunities and challenges for marketers to persuade consumers to buy, and not just browse.

In view of these significant changes and the growing wealth of knowledge in marketing research and retailing practices, we develop a conceptual framework of the shopper journey that complements other existing models: *the needs-adaptive shopper journey model*. With shopper wellbeing at its core, this model facilitates a deeper understanding of the broad range of shopper needs and activities that occur in a shopper's journey, so that firms can better adapt to the differing needs of shoppers and maximize satisfaction. Additionally, we identify 12 shopper journey archetypes representing the paths that consumers commonly follow depending on their shopping needs – the classic journey, the retail therapy journey, the impulsive journey, the opportunistic journey, the social network journey, the entertainment journey, the outsourced journey, the joint journey, the gifting journey, the required journey, the routinized habit journey, and the learning journey. Based on the results of two exploratory empirical studies, we examine the characteristics of these archetypes and how they are similar to and different from one another. Finally, we discuss the theoretical and practical implications of our proposed framework, and identify a number of key questions and directions for future research.

(297 words)